

POST WEBINAR

EMAIL NURTURE TEMPLATES



→ Drive additional appointments from
your webinar registrants and attendees

Use these resources to:



Stay top-of mind for webinar attendees after your phone follow-up is complete



Drive additional appointments for your practice in the weeks following your webinar

Need Coaching?

Scan to
schedule:





STEP-BY-STEP: POST-WEBINAR COMMUNICATION

During your automated webinar, some attendees will book appointments directly with your office.

But that doesn't mean those who don't book are lost opportunities!

In fact, advisors see a significant increase in appointments when they conduct targeted follow-ups after the webinar.

Below are the steps to take:

- (1)** Check with your webinar marketer to see if they perform automated follow-up on your behalf. This often includes communicating with webinar attendees who didn't book an appointment and sending a webinar re-watch link to those who registered but didn't attend the webinar, or who didn't stay on for the entire webinar.
- (2)** Make outbound phone calls to all webinar attendees, even if they didn't watch the entire webinar. Your call-to-action is to see what questions they have after the webinar and explain how you can help them better understand their personal and unique Retirement Tax Bill.
- (3)** Many advisors also like to make calls to prospects who registered but didn't attend the webinar.
- (4)** Target any remaining registrants and attendees who haven't booked an appointment with one or more of the emails that follow.
- (5)** Be sure to add all webinar registrants to your marketing list!



RTB EMAIL

SUBJECT LINE: Is your Retirement Tax Bill too big?

On [\[this/last\]](#) week's webinar, we discussed the retirement tax bill that could be building in your IRA or 401(k).

Could your bill be bigger than you think?

Let's find out.

I invite you to generate a complimentary Retirement Tax Bill analysis, which will immediately let you see your potential taxes in retirement: See My Tax Bill Now [\[insert link to your RTB landing page\]](#)

Your taxes determine how much of your hard-earned savings you get to keep – and how much you send to the IRS.

So click here [\[insert link to your RTB landing page\]](#) to generate your report.

Once you've seen your numbers, let's talk.

There may be ways I can help you reduce your retirement tax bill - and keep more of the money you've worked so hard to save. [\[call setting details and link\]](#)

Sincerely,

[Advisor Name](#)

P.S. – If there's one thing I hope you took away from the webinar, it's this: **Tax rates may be *higher*** in the future than they are today.

If you're wondering how higher taxes could impact your retirement, I can run some scenarios for you. Just click here [\[insert meeting link\]](#) and select a convenient time for a brief call to get started.



WHITE PAPER EMAIL

SUBJECT LINE: The latest from Washington

Thanks again for joining us for our webinar [\[this/last\]](#) week.

One thing I've heard from attendees: It made them concerned about what's happening in Washington.

I want to share an additional resource Becky put together for us - it's a white paper outlining the top issues Washington may be considering - and how they could impact your retirement.

Here's the analysis: [Congressional Spending & The Impact to Savers](#).

I'm sure you don't want to pay more taxes in retirement than is necessary - so let's connect for a quick call and see if there are ways I can help protect your retirement from Washington.

You can choose a time that works with your schedule here [\[insert meeting link\]](#).

I look forward to helping -

Sincerely,

[Advisor Name](#)

P.S. - If you remember from the webinar, Becky used to work in the White House and U.S. Congress. She [shares](#) some great insight into where taxes might be headed - and how it might impact you.



VIDEO EMAIL

SUBJECT LINE: Can I help?

I've sent you several emails on taxes in retirement. And this will be my last one.

But it's an important one!

My passion is helping savers like you understand their Retirement Tax Bill – and ways to potentially reduce it.

I'm sharing a [brief video](#) Becky recorded for us, which dives a little deeper into why taxes might be the biggest retirement risk facing savers like you today.

[Watch it here.](#)

Let me know what you think.

If you have questions about YOUR tax bill in retirement, I'm here to help.

[\[call setting details\]](#)

Sincerely,

[Advisor Name](#)