

Step 01 Is the content topic B.E.N.S?

- **Big.** Is this a big idea? Is it a big claim?
- **Easy.** Is it easy for the viewer to do?
- **New.** Is it new?
- **Safe.** Is it safe?

Step 02 Draft Video Title & Thumbnail

Should meet one of the following criteria:

- Sparks curiosity
- Introduces an information gap
- Creates cognitive dissonance

Step 03 Document Questions the Title/Thumbnail Will Evoke

- Ex: What is the first step to take action? How do I know this concept works? What happens if I don't implement this strategy? How do I know if it applies to me? Write down as many as you can think of and list them in order of importance.
- **What 3 will they care about MOST?** Answer those first in the video!
- If the thumbnail and title don't create 3 BIG QUESTIONS, revisit Step #2.

Step 04 Summarize Answers to the 3 BIG Questions

Write down 1-3 things the viewer needs to know about each of the BIG questions.

Step 05

Write the Opening Hook (3 Options)

- **Statement Hook.** Shock or surprise the viewer with a bold statement.
- **Question Hook.** Pose a question that the viewer will want to know the answer to (confirm it is B.E.N.S).
- **Story Hook.** Drop the viewer into the middle of a story or case study being featured in the video.

Step 06

Write the Set-Up

Using the top questions identified in Step #3, write a set-up that includes 1-3 exciting things the viewer will learn in the video.

Ex: “In this video, I’m going to reveal three things:

- What XYZ strategy is
- How XYZ strategy can transform your retirement
- Real-life examples of retirees implementing XYZ strategy”

Step 07

The Detailed “How To”

Write the video script by elaborating on the 1-3 important things you want to communicate to the viewer.

Step 08

Close & CTA

Three examples:

- Go here to take the “How much do I need to retire?” quiz
- Contact me for a free retirement planning session
- Join our weekly 5-Minute retirement email

Video Hook Examples

Example 01

Average/Median Net Worth

Hook: “I’m sharing new data that comes out every three years that will help answer questions like: Am I on track for retirement? Am I doing all the right things? Have I saved enough for retirement? We’ll focus on five practical tips throughout this video to improve your own net worth so you feel more confident about moving into retirement.”



Example 02

These Disappear in Retirement

Hook: “These five Things disappear when you retire. The problem is...most retirees really NEED these things to keep happening if they want to make retirement their best stage of life yet. Some of them are financial related, and some are non-financial. So, in this video, I’ll go over what the five things are, why they disappear, and practical actions to hold onto these things to increase fulfillment in retirement.”



Example 03

7 Accounts You Need for Retirement

Hook: “Let’s take a look at the seven accounts you need to get your retirement life organized. These are seven that you’ve heard of before, so I’m going to fly through them in the first part of this video. But then I’ll share common MISTAKES people make when trying to use these accounts. And then I’ll go over a few SPECIFIC STRATEGIES you might be able to apply to really maximize the benefit of these accounts before and during retirement.”

