



Free Guides

- Legacy Will Planning Guide
- end of the year planning guide
- retirement & tax planning quick sheet
- A guide to stewarding your inheritance
What to do when you receive an inheritance?
- an investor's guide
to finding your right fit advisor



6-Step Email Nurture Sequence



6-Step Email Nurture Sequence

Text Message 1: Deliver Free Guide

 Sent Immediately

1 Email 1: Welcome

Purpose: Establish immediate value.

 Sent 2 Days After Receiving Guide

Text Message 2: Engage With Prospect

 Sent After Email 1

2 Email 2: Problem, Solution, Result

Purpose: Highlight the core pain point and position the brand as the solution.

 Sent 4 Days Later

3 Email 3: Testimonial

Purpose: Build trust and credibility through client success stories.

 Sent 3 Days Later

4 Email 4: Overcoming Objections

Purpose: Address and dismantle common mental roadblocks.

 Sent 5 Days Later

5 Email 5: Paradigm Shift

Purpose: Reframe how the reader thinks about financial advising.

 Sent 7 Days Later

6 Email 6: Closing Sales Letter

Purpose: Create urgency and drive action.

 Sent 7 Days Later

Deliver Free Guide (Text Message 1)

Hi {{contact.first_name}}, thanks for claiming your free guide!
Here's the download link: {{custom_values.marketing_download_url_7_steps_to_planning_for_your_happy_retirement}}

{{custom_values.marketing_email_person}}



Sent After
Email 1



Welcome Email (Email 1)

Hi [NAME],

I hope you're doing well!

I noticed your interest in our Financial Guide, and I wanted to invite you to something even better—an intro call, which is the first step in our process to help you achieve your retirement goals.

At [COMPANY NAME], we believe that true financial success is about much more than just investing. Our goal is to help you build and protect your wealth through a comprehensive approach that covers all aspects of your financial life.

Why Partner with Us?

- **Personalized Wealth Strategies:** We go beyond financial planning to develop a tailored financial roadmap that aligns with your unique goals, from wealth building to retirement planning and beyond.
- **Holistic Financial Health:** We analyze your complete financial picture, identifying opportunities for growth, tax efficiency, and long-term wealth preservation.
- **Proactive Wealth Management:** Our expert team stays ahead of market trends, tax laws, and financial opportunities, to help you benefit from a strategy designed to grow and protect your assets.
- **Ongoing Support:** We're with you all year round—providing guidance and support to help you make smart financial decisions every step of the way.
- **Peace of Mind:** With our comprehensive approach, you'll have the confidence to focus on what matters most while we help you secure your financial future.

Let's Build Your Financial Future Together

We'd love to discuss how we can help you achieve financial security and maximize your wealth.

Book your FREE consultation today and take the first step toward achieving your financial goals.

[Click here to schedule your session](#) and let's get started!

Looking forward to speaking with you soon.

1



Sent 2 Days
After Receiving
Guide

Engage With Prospect (Text Message 2)

 Sent After
Email 1

Hi {{contact.first_name}}, thanks for downloading our guide! If you could solve one thing with your financial situation, what would it be?

{{custom_values.marketing_email_person}}



Problem, Solution, Result (Email 2)

2

Dear [NAME],

We understand that navigating your financial future can be complex, leaving you feeling overwhelmed and uncertain. But it doesn't have to be this way.

 Sent 4
Days Later

That's where [COMPANY NAME] can help. We operate from a "we care more" value, where we hope each individual person, or family we work with feels more peace, confidence, and security after meeting with us. We specialize in retirement planning, investment management, estate planning, and tax minimization strategy, acting in your best interest to help you overcome your financial challenges. Our goal is for you to confidently achieve your retirement goals with our personalized wealth management strategies.

Imagine a future where financial security and peace of mind aren't just dreams but reality. Picture yourself enjoying the rewards of a well-planned retirement, free from financial stress and uncertainty. This is the transformation we aim to facilitate.

So why wait? [Schedule Your 15-minute Introductory Call](#) today and start your journey towards a secure and fulfilling financial future.

Testimonial (Email 3)

Dear [NAME],

We believe in the power of stories, especially those of success and transformation. Today, we want to share one such story with you, a story that could very well be your own.

Jack and Diane Miller (a fictitious name) were in their 50s when they began to look for a financial advisor. Jack was stressed out from his job which was causing health problems and he really just didn't like his job. Diane was worried about Jack's health and they wanted help with their finances so that Jack could quit his job. Jack had saved as much as he could in addition to maxing out his 401k. He also had equity from his job that he kept in a separate brokerage account. Other than these two things they were not active in investing outside of their 401k and Jack and Diane were concerned that they weren't prepared for retirement. They lacked confidence in their financial plan and wanted help having peace of mind so that Jack could retire and recover his health. Plus, Jack was just not able to manage his own money — it was too time consuming in addition to his work.

They decided to hire [COMPANY NAME] and their comprehensive financial plan gave them the confidence and peace of mind they were looking for. Jack was able to quit his job. Getting to a place where Jack and Diane felt comfortable that they were on track to retire comfortably was a priority.

Just like Jack and Diane, you too can transform your financial future. We're here to guide you every step of the way, helping you navigate the complexities of retirement planning.

Ready to start your journey? [Schedule Your 15-minute Introductory Call](#) today, and let's explore how we can help you achieve your financial goals.

3

 Sent 3 Days Later

Overcoming Objections (Email 4)

Dear [NAME],

We understand that making the decision to entrust someone with your financial future is a big one. We know you may have valid concerns, and we want to address a few common objections we often hear:

1. **“I’m worried about the cost.”** As a fiduciary advisor, we prioritize transparency. We offer fee-only services, eliminating hidden costs. Our aim is to help you maximize your income while minimizing liabilities.
2. **“I can manage my finances myself.”** While self-management is an option, the complexities of tax optimization and estate planning can be overwhelming. Our team can provide expert guidance to ensure your financial health.
3. **“I’m worried my unique needs won’t be met.”** We specialize in providing personalized wealth management strategies. Whether you’re a pre-retiree, retiree, or business owner, we adapt our solutions to your specific circumstances.
4. **“I’m unsure about the return on this investment.”** Financial planning is an investment in your future security. Our clients have seen first-hand how our services can transform financial confusion into confidence and control.

We’re here to walk through your concerns and demonstrate how our expertise can turn these potential obstacles into stepping stones toward your financial security.

Ready to discuss your future? [Schedule Your 15-minute Introductory Call today.](#)

4



Sent 5
Days Later

Paradigm Shift (Email 5)

Dear [NAME],

When it comes to financial planning, many believe that it's a one-size-fits-all service, designed primarily for the ultra-wealthy. But at Goodwin Investment Advisory, we see things differently.

We believe that financial planning and wealth management should be personalized and accessible to everyone, regardless of your current financial status. We understand that each individual, each family, each business owner has unique financial needs and goals. That's why we offer tailored solutions, not generic advice.

Unlike some firms that focus solely on investments, we take a comprehensive approach. We incorporate retirement planning, investment planning, estate planning, and tax optimization to create a holistic strategy for your financial future. We can advise you on things we don't manage because we care about your entire financial picture and helping you reach your retirement goals. As a fiduciary advisor, we're committed to acting in your best interests, not ours. This means we offer fee-only services, minimizing hidden costs and providing transparency.

We're not just advisors; we're partners in your financial journey, offering guidance, support, and expertise every step of the way. We aim to empower you to make informed financial decisions and transform the way you approach retirement.

Ready to experience the difference? [Schedule Your 15-minute Introductory Call today.](#)



Sent 7
Days Later

5

Closing Sales Letter (Email 6)

Dear [NAME],

Are you feeling overwhelmed by the complexities of retirement planning?

Perhaps you're grappling with how to optimize your taxes, or maybe you're unsure of how to effectively plan for your retirement or even when you can retire. Sometimes, you just need an expert to look at everything and let you know if you are on track to retire and, if so, when you can. Other times with more money comes more complexity, possibly causing stress and uncertainty. Or, you just do not have the time to manage all of your assets yourself.

Many of our clients were once in your shoes, feeling overwhelmed and unsure. But with [COMPANY NAME], they have found their path to financial clarity and security. They took the leap and transformed their financial future.

Now, it's your turn.

We look forward to connecting with you and hearing your retirement goals. Please [Schedule Your 15-minute Introductory Call](#) with us.

This call is your first step towards financial peace of mind. We'll discuss your unique financial situation and how we can guide you to achieve your retirement goals.

Imagine waking up each day confident in your financial future. Picture yourself, free from the stress of financial uncertainty, enjoying a peaceful and fulfilling retirement. This is the success that we want for you at [COMPANY NAME]

Don't delay, [COMPANY NAME]. [Schedule Your 15-minute Introductory Call](#) today, and let's start your journey towards financial security.

6



Sent 7
Days Later