

# AUTOMATED FUNNELS

*Plug it in and turn it on for more clients.*

**MM RIA MARKETING**  
GROWTH SOLUTIONS  
FOR ADVISORS

## WHAT IS IT?

With our Plug-and-Play RIA Funnels, you just flip the switch “on” for more qualified leads and clients.

While you focus on helping your current clients, your automated funnel system is hard at work attracting, capturing, and sending engaging emails to leads that nurture them into setting an appointment with you.



## OUTCOMES

✓ **Save Time**  
Spend more time with your clients. The grunt work of getting more clients is done for you.

✓ **More Referrals**  
Getting referrals has never been easier with an automated referral funnel.

✓ **Save Money**  
Efficient and effective on a mass scale. You'll spend less to get so much more.

✓ **More Clients**  
Never worry about where your next client will come from again.

✓ **High ROI**  
Average of 300%+ ROI in the first year and 2,000%+ ROI over 5 years.

✓ **Steady Growth**  
Continually grow your AUM with a funnel that never stops.

## WE DROP YOU OFF AT THE FINISH LINE



You want to get more clients but don't know where to start. Or maybe you're spending a lot of time and money on marketing with little return. Do you feel stuck?

**Imagine how much easier your life would be if prospects who were excited to work with you consistently appeared at your doorstep.**

That's exactly what you get with an automated funnel. It does the legwork and drops you off at the finish line to close the deal.

## A SMALL INVESTMENT NOW LEADS TO GREATER RETURNS IN THE FUTURE

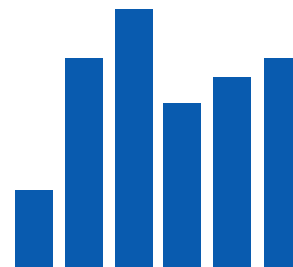
	Investment	Return
Hours	4 hrs over initial 2 weeks	Save 30-40 hrs/mo
Dollars	\$3,500	3x in first year
Appointments	-	4 /month
New Clients	-	2 / month
ROI - Yr 1	\$3,500 one time investment	<b>\$15,000</b>
ROI - 5 Years		<b>\$450,000</b>
ROI - 10 Years		<b>\$900,000</b>

\*Assumes average revenue per client per year of \$7.5K

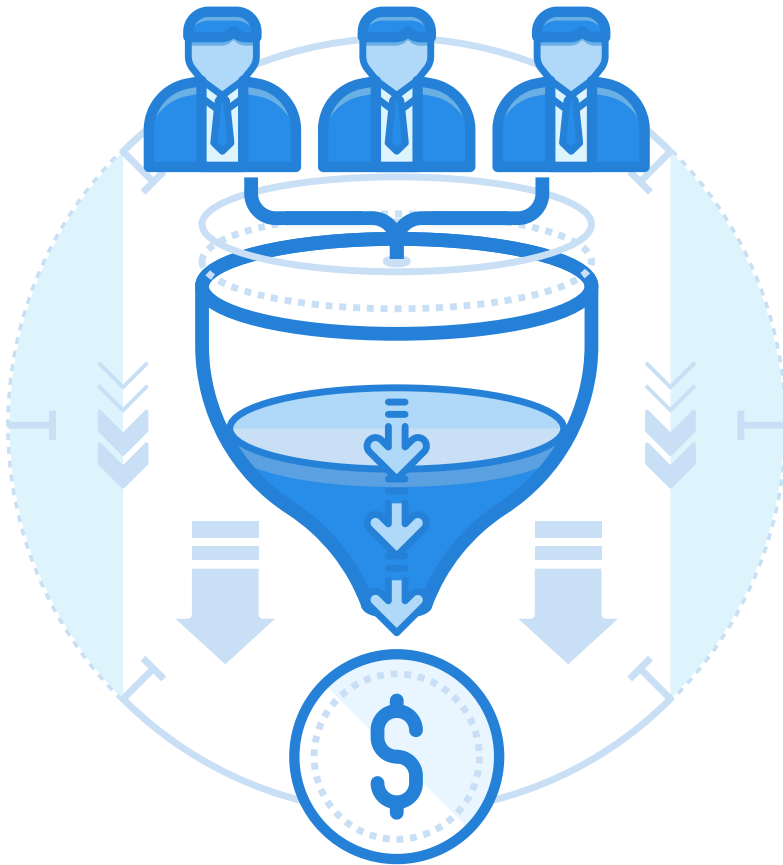
↑ **329% ROI**  
in the *first year*

↑ **12,757% ROI**  
over *five years*

↑ **\$450,000**  
in fee *revenue* in five years



# TYPES OF AUTOMATED FUNNELS



## **WEBSITE**

Increase leads 10x by capturing “warm” leads from your website and automating follow-up until they take action.

## **ADS**

Get the most out of your ad spend by implementing an efficient and effective lead-generating funnel.

## **SOCIAL MEDIA**

Leverage your social media audience to maximize leads and clients.

## **BLOG**

Turn your blog audience into leads. Content marketing costs 62% less than traditional marketing and gets 3x the results.

## **WEBINAR**

If you generate leads through speaking engagements, scale your efforts and reach a wider audience online to see 5x the results.

## **OPT-IN TEXTS**

Opt-in texts allow you to capture (and automatically follow-up with) leads during presentations, networking events, podcasts, interviews...anywhere you go!

## **QUALIFY LEADS**

Don't waste your valuable time on unqualified leads. A funnel can qualify leads before they speak to you.

## **REFERRALS**

Maximize lead opportunities by automating requests for referrals through event or time triggered emails.

## **ONBOARDING**

Save time and increase efficiency by automating your process to onboard new clients.

# TESTIMONIALS

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*"I always thought that making money has to be hard. MM RIA showed me it doesn't. The funnel they created for me made **growing my AUM much easier!**"*

Brad P., Dallas, TX  
Registered Investment Advisor

*"I struggled for years to get new clients. It was a huge burden and I hated cold-calling and aggressive networking. I wish I had found MM RIA sooner because implementing a funnel **completely turned my business around.** I highly recommend MM RIA."*

Jaime L., Richmond, VA  
Registered Investment Advisor

*"Wow! What a difference 6 months can make. The funnel MM RIA built for me has generated **5x the number of leads and doubled my AUM.** Unreal. Thank you!"*

Jeremy C., Orlando, FL  
Independent Financial Advisor

[CLICK HERE TO SCHEDULE A  
FREE CONSULTATION](#)

# HOW IT WORKS

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## STEP 01

### DISCOVER

We work together to shape your RIA Leads Funnel based on your unique needs and goals.

## STEP 02

### DESIGN

Move from goals to plug-and-play funnels that get more clients, referrals and a higher ROI.

## STEP 03

### DELIVER & IMPLEMENT

We put all the pieces together and flip the switch to "on" for more leads and clients.

# FUNNELS FAQS

*"The number one reason for failure in sales is an empty pipe, and the root cause of an empty pipeline is the failure to prospect."*

*Jeb Blount*

## HOW MUCH DOES THIS COST AND IS IT WORTH IT?

The one-time investment for one RIA Leads Funnel is \$3,500. Is it worth it to invest \$3,500 to earn \$15,000+ in fee revenue...in the first year? That's a minimum of a 329% return on investment. So yes, it is worth every penny!

In fact, we think it's a steal. It's a small price to pay for something that will save you a ton of time and money and consistently get you more clients.

## WHAT TOOLS DO YOU USE AND DO I HAVE TO USE YOURS?

It varies depending on the type of funnel we create for you but you will most likely need:

- A landing page software
- An email service provider
- A customer relationship mgmt. tool
- Online calendar
- Questionnaire builder

We use and recommend:

- Leadpages (landing page)
- Drip (email service provider)
- Pipedrive (CRM)
- Calendly (online calendar)
- Typeform (questionnaires/forms)

If you buy through us, we are also able to offer a steep discount.

However, we do NOT require you to use those tools. We are familiar

with a wide variety of marketing tools and are happy to work with any that you're already using or would prefer to use.

## HOW DO YOU "CAPTURE" AND "NURTURE" LEADS?

Offering something for free that your ideal client would find valuable (e.g. a retirement planning checklist or webinar), in exchange for an email address allows us to capture "warm" leads (they are interested but not ready to take action yet).

Continuous engagement through email automation then builds a trusting relationship while also nurturing them into setting an appt. with you.

## HOW LONG UNTIL I START SEEING RESULTS?

We've seen clients get a 300-500% return on investment in the first year alone.

Every advisory firm is in a different stage, so it really depends on your unique situation. However, you can reasonably expect to see tangible results in about 4-5 weeks.

## WHATS INCLUDED?

Setup and integration of all the tools and depending on the funnel, we will create or assist in creating lead magnets (e.g. whitepapers), emails, blog, ad, custom audiences, landing & thank you pages, website offers, webinar registration & event

pages, opt-in texts, and questionnaires.

## HOW MUCH OF MY TIME IS NEEDED?

About 4 hours over the course of 2 weeks.

## ARE YOUR FUNNELS COMPLIANT WITH SEC REGULATIONS?

Absolutely. Members of our team are former financial advisors and fully understand the critical importance of compliance. We created an efficient, but strict approval process for everything that the public will see. Nothing will see the light of day until you and your compliance department have approved it.

## WHAT MAKES MM RIA DIFFERENT FROM OTHER AGENCIES?

For one, members of our team are former financial advisors who transitioned into marketing. So, we have unique insights into what your business needs to flourish. Add that to our decades of marketing experience and we can make any business a success. So you can rest assured we've got the skill set but what's a business without a mission?

Our mission is to build an authentic, trusting relationship with each and every one of our clients. We take the time to get to know you, listen to your struggles, and create the most suitable funnel based on your individual needs and goals. Collaboration, attention to detail, innovation, accountability and knowing our clients well are what make us different.

## THIS IS EXACTLY WHAT I NEED. HOW DO I GET STARTED?

Great! We're excited to set up your plug-and-play funnel so you get more clients and achieve your goals!

To get started, [click here to schedule a free consultation](#) and talk about the next steps.

**GET STARTED**