

WANTING MORF THAN LEADS, GREG CRAVED QUALIFIED, AFFLUENT **PROSPECTS WHO SHOW UP & BOOK REAL APPOINTMENTS.**

GREG GOT TRUST, AUTHORITY, & A PREDICTABLE WAY TO TURN A ROOM **FULL OF STRANGERS** INTO MULTIMILLION-**DOLLAR CLIENTS.**

THE GREG LAWSON STORY

GREG DIDN'T JUST HOST A SEMINAR — HE LAUNCHED A NEW GROWTH ENGINE.

Greg Lawson was no stranger to seminars, but this one hit different. Held in an oversaturated market where financial advisors are a dime a dozen and prospects are numb to the pitch, Greg knew breaking through wouldn't be easy. From the moment prospects stepped into the steakhouse, they weren't just there for dinnerthey were tuned in.

Instead of hard-selling, he educated—and watched the room lean in. By the end of night one, he'd booked 12 appointments. Night two added 11 more.

The presentation framework helped Greg guide conversations with ease, shifting people from "maybe later" to "how soon can we start?"

By week's end, Greg had over \$9 million in qualified pipeline—and a system he could scale. He didn't just host a seminar. He built a high-trust conversion machine.

THE AGENT PROFILE _

GREG LAWSON

- Producing \$3.2M in FIA yearly (before seminar)
- Niche: HNW 58-70 year olds w/\$550k-\$2M in assets
- Needs a predictable, highconversion lead flow
- Wants a soup-to-nuts system

Name is fictional, based on an acutal agent.

THE SHIFT: HOSTING A ROTH **BLUEPRINT DINNER SEMINAR** The seminar is designed as a persuasive, educational presentation where the advisor walks attendees through compelling narratives and the six chain reactions caused by RMDs. Used the Roth Blueprint presentation and ACTE framework (a Navy SEAL decision making model) to position value. • Assess the situation • Create a simple plan Take action Evaluate The seminar's purpose is to guide attendees toward a key decision: "Do I want to pay taxes now or later?" This sets the stage for booking a follow-up appointment.

SEMINAR RESULTS

The Roth Blueprint seminar isn't just a presentation it's a precision tool for converting high-net-worth prospects into loyal clients.

The Roth Blueprint software delivers the scientific backbone of the approach—quantifying tax impact, illustrating conversion strategies, and transforming abstract risks into tangible financial decisions.

Together, the Roth Bluleprint seminar system, the software, and DMI partnership didn't just fill a room—they filled his pipeline.

BY THE NUMBERS

Mail Sent: 10,000 pieces

Attendees: 96 (over 2 nights)

Appointments Booked: 23 (plus warm leads pending)

Households represented: 42

Average Case Size: \$3.1M

Pipeline Generated: \$9.2M+

Webinar ROI 30:1

Confidence Gained: Priceless

TO GET MORE INFORMATION ON THE ROTH BLUEPRINT OR SEE IF YOU QUALIFY, CONTACT YOUR DMI VICE PRESIDENT OF SALES. OR CALL 781.919.2337 TO SPEAK WITH DECLAN DONAHUE.





GREG WANTED TECHNOLOGY THAT COULD HELP HIM CLOSE DEALS AT POINT-OF-SALE.

HE GOT A TOOL THAT **INSTANTLY SHOWS SKEPTICAL CLIENTS** THE NUMBERS, **DISSOLVES OBJECTIONS, AND TURNS HESITATION** INTO ACTION.

THE GREG LAWSON STORY

USING THE ROTH BLUEPRINT TO CLOSE A \$2.8M ROTH **CONVERSION CASE.**

After the seminar, Greg didn't just ride the wave—he capitalized on it. Tom and Denise, a high-net-worth couple who attended his Roth Blueprint dinner, came in curious but skeptical. They were classic fence-sitters: concerned about RMDs, worried about IRMAA, but paralyzed by the thought of writing a six-figure check to the IRS.

Greg didn't push the sale...He demonstrated a strategy. Using the Roth Blueprint Software live at the table, he mapped a 7-year strategy that kept their IRA value intact, dodged IRMAA penalties, and chopped \$1.1M off their future tax bill—all without

out-of-pocket costs or tax bracket jumps. When he clicked "Optimize" and the numbers lit up the screen, the fog lifted. "That makes sense," Tom said—and they were in.

Three meetings later, \$2.8M was in a Roth-friendly annuity with a 20% bonus. No hard sell. Just clarity, confidence, and a killer tool that did the heavy lifting.

THE CLIENT PROFILE

TOM & DENISE

- Ages 66, 64
- Concerns: RMDs, IRMAA, inheritence taxes, tax hit from Roth conversion.
- Wants: tax-smart retirement strategy that protects liquidity, avoids penalties, and leaves a tax-free legacy

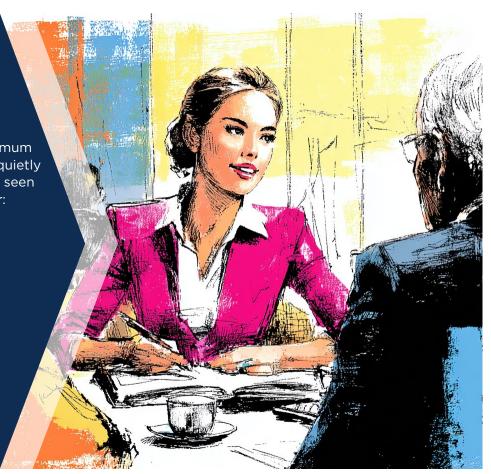
Names are fictional, based on an acutal clients.

6 CHAIN REACTIONS TRIGGERED BY RMDS

One of the Roth Blueprint software's most powerful moves at the point of sale? It visually exposes the six chain reactions triggered by Required Minimum Distributions—hidden tax traps that quietly drain wealth. Most clients have never seen the full ripple effect laid out together:

- 1. Increased AGI
- 2. Taxation of Social Security
- 3. IRMAA surcharges
- 4. Loss of deductions
- 5. The widow's penalty
- 6. Taxable inheritance under the SECURE Act

The software connects the dots in real time—turning complex tax dynamics into a crystal-clear "aha" moment that drives action.



THE POINT-OF-SALE SHIFT

The Roth Blueprint software transforms interest into action at point of sale.

It builds on the ACTE framework introduced at the seminar, guiding clients from curiosity to commitment with a clear, visual narrative.

By showing real numbers, revealing the costly chain reactions of RMDs, and offering Roth-friendly annuity strategies that eliminate out-of-pocket taxes, the software makes the decision feel not just smart—but inevitable.

BY THE NUMBERS

- Time to close: 3 meetings
- Total Premium: \$2.8M
- Product Used: Roth-friendly FIA with 20% bonus
- Tax Source: Internal
- Client Benefits:
 - No out-of-pocket taxes
 - No RMDs
 - \$3.6M Roth projected at age 95

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