



THE ROTH BLUEPRINT

HOW A STEAK DINNER TURNED INTO \$9M IN PIPELINE

WANTING MORE 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 dinner—they 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, high-conversion lead flow
- ✓ Wants a soup-to-nuts system

Name is fictional, based on an actual 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 Blueprint 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.**





THE ROTH BLUEPRINT

POINT OF SALE SUCCESS: FROM 'ON THE FENCE' TO 'ALL IN'

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, inheritance 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 actual 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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