



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.**

