

# SafeMoney

Case Study

## Transform

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Transform Your Financial  
Advisory Practice with  
SafeMoney.com

## 20 years

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Financial Services Industry &  
Professional Digital Marketing  
experience



SAFEMONEY  
Advisors.com

## Success Stories

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Industry leaders in  
branding, consumer  
education & online  
credibility

# Online Expertise

Safe Money Broadcasting has been at the forefront of providing cutting-edge marketing solutions for financial advisors. We help numerous advisors grow their businesses, build client trust, and achieve exceptional results. As a go-to partner for financial professionals seeking growth and credibility, **SafeMoney.com** enhances online visibility through top rankings on Google searches, attracting potential clients and bolstering advisors' online presence.

## Success Story

- **Challenge:** Needed to build credibility and provide valuable resources to clients.
- **Solution:** Leveraged SafeMoney.com's extensive content and tools.
- **Result:** Attracted new clients through improved online visibility and informational resources.
- **Testimonial:** "Two cases come to mind that I closed using the SafeMoney personally branded landing page: one annuity for \$300,000 premium and a second for \$200,000. I highly recommend partnering with SafeMoney.com as an inexpensive way to provide value-added services and positive exposure for your business."

*Pat Kerfoot*

**Pat Kerfoot**  
FINANCIAL PROFESSIONAL





# Expert Advice

Our mission is to ensure your client and prospects enjoy the retirement lifestyle and financial stability they deserve.

We start with clear, honest, and objective financial education. Our goal is to help pre and post retirees understand safe retirement strategies.

## Success Story

- **Challenge:** Navigating the complexities of financial advising while providing clear, reliable information to clients.
- **Solution:** Utilized SafeMoney.com's comprehensive educational resources and support.
- **Result:** Enhanced client trust and successfully closed significant annuity deals.
- **Testimonial:** "SafeMoney.com is the best resource I have found for my clients and prospects. The content is impressive and has helped me gain new clients who found me through SafeMoney.com."

*Doc Faulkner, CFP*

**Doc Faulkner, CFP**

CEO / President

FINANCIAL FREEDOM GROUP



# Your Future

Safe Money Broadcasting is a leading provider of innovative marketing solutions for financial advisors.

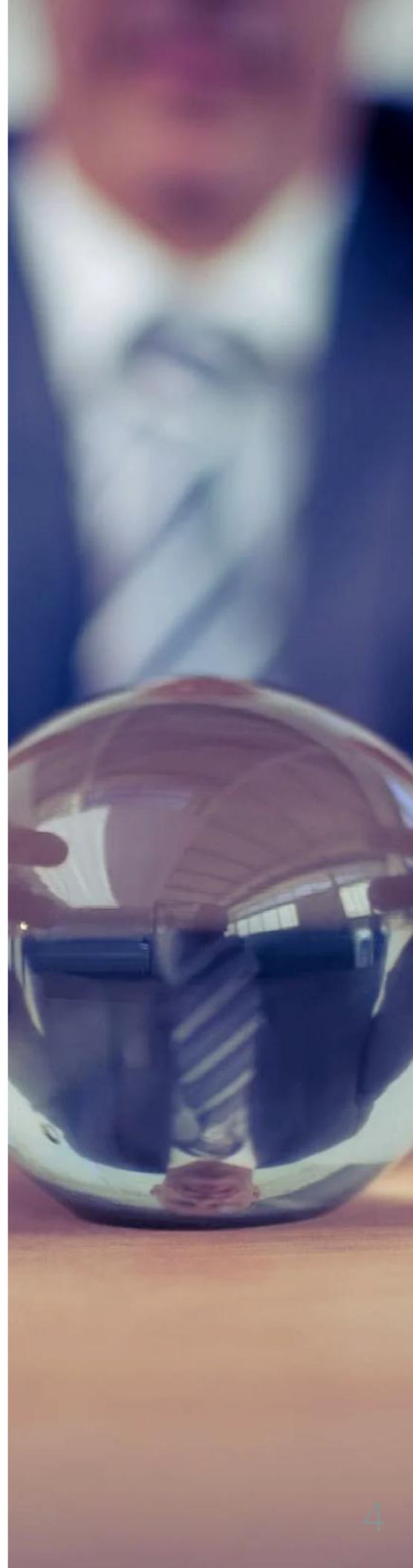
Since our founding in 2011, we have empowered hundreds of advisors to build their businesses, establish trust with clients, and achieve unparalleled success. Our comprehensive suite of services, coupled with our extensive industry experience, positions us as the premier partner for financial professionals seeking growth and credibility.

## Success Story

- **Challenge:** Required effective materials to educate clients about financial products.
- **Solution:** Used Safe Money Broadcasting's charts, graphs, and educational booklets.
- **Result:** Closed multiple annuity cases, including a \$340,000 and a \$500,000 deal.
- **Testimonial:** "The materials for advisors to use are great! They help close annuity cases easily. Safe Money works!"

*Jon Bellman*

**Jon Bellman**  
FINANCIAL PROFESSIONAL





# Complete Streamlined Marketing

Safe Money Broadcasting provides comprehensive marketing services, including advertising, public relations, and investor communications, ensuring all aspects of your business growth are covered.

Our team, with over 50 years of combined experience, offers tailored insights and guidance. As an independent provider, we help you succeed without requiring you to change your existing business relationships.



## WHY CHOOSE SAFE MONEY BROADCASTING

- **Unmatched Experience:** Our team has over half a century of industry expertise, ensuring you receive the highest level of service and support.
- **Proven Results:** Trusted by hundreds of advisors nationwide, our services have a proven track record of helping professionals close more sales and build stronger client relationships.
- **Comprehensive Support:** From marketing and advertising to public relations and investor communications, we offer a complete suite of services designed to drive your success.



# The Sky's the limit.

## Client Testimonials:

**Jon Bellman:** "The materials for advisors to use are great! They help close annuity cases easily. Safe Money works!"

**Pat Kerfoot:** "I highly recommend partnering with SafeMoney.com as an inexpensive way to provide value-added services and positive exposure for your business."

**Doc:** "SafeMoney.com is the best resource I have found for my clients and prospects. The content is impressive and has helped me gain new clients who found me through SafeMoney.com."

**California Investor:** "I felt very comfortable with them....like being with a trusted friend. It was a good fit and I am looking forward to a good financial outcome."

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Enhance your professional presence and secure a top spot in the competitive financial advisory market. Partner with Safe Money Broadcasting today.



**SafeMoney.com**