

FINANCIAL ADVISOR LEAD GENERATION

# CASE STUDIES AND RESULTS

# SALES & SOFTWARE MARKETING AUTOMATION LLC

WE PARTNER WITH FINANCIAL ADVISORS GLOBALLY  
TO HELP THEM GROW THEIR CLIENT BASE USING A  
PREDICTABLE LEAD GENERATION SYSTEM

# RETIREMENT PLANNING (UK, USA)

Search and filter Lifetime: 4 Feb 2021-25 Mar 2021

Campaigns **Ad sets** Ads

+ Create
Duplicate
Edit
More
View Setup
Columns: Custom
Breakdown
Reports

<input type="checkbox"/>	Ad set name	Attribution setting	Results	Reach	Impressions	Cost per result	Amount spent
<input type="checkbox"/>		7-day click or ...	4 On-Facebook leads	1,458	2,047	\$18.11 Per on-Facebook lea...	
<input type="checkbox"/>		7-day click or ...	13 On-Facebook leads	3,345	6,160	\$16.73 Per on-Facebook lea...	
<input type="checkbox"/>		7-day click or ...	21 On-Facebook leads	3,760	7,742	\$13.20 Per on-Facebook lea...	
<input type="checkbox"/>		7-day click or ...	27 On-Facebook leads	7,734	13,938	\$15.42 Per on-Facebook lea...	
	<b>Ad sets</b>	7-day click or ...	<b>65</b> On-Facebook leads	<b>12,253</b> People	<b>29,887</b> Total	<b>\$15.13</b> Per on-Facebook leads	

# RETIREMENT PLANNING (UK, USA)

# MORTGAGES (FIRST TIME BUYER, REMORTGAGE, BTL (UK))

Campaigns										Ad Sets	Ads
A/B Test	Rules	View Setup	Columns: Performance	Breakdown	Reports						
Delivery	Bid Strategy	Budget	Attribution Setting	Results	Reach	Impressions	Cost per Result	Amount Spent	End		
Active	Lowest cost	£10.00 Daily	7-day click or ...	7 Remortgage Lead	6,145	10,002	£16.37 Per Remortgage Lead	£114.56			
Off	Lowest cost	£10.00 Daily	28-day click o...	30 On-Facebook Leads	13,663	30,565	£7.71 Per On-Facebook Le...	£231.36			
Off	Lowest cost	£10.00 Daily	28-day click o...	9 Messaging Conversa...	4,493	7,448	£12.93 Per Messaging Conv...	£116.37			
Off	Lowest cost	£10.00 Daily	28-day click o...	311 Messaging Conversa...	50,080	148,551	£5.76 Per Messaging Conv...	£1,791.88			
			<b>Multiple Attrib...</b>	—	<b>72,976</b> People	<b>196,566</b> Total	—	<b>£2,254.17</b> Total Spent			

# LIFE & HEALTH INSURANCE (UK, EUROPE, USA)

Search: Campaign Name contains **Life Insurance** X Search or add filters

Campaigns 1 selected x Ad Sets for 1 Campaign Ads for 1 Campaign

Create Duplicate Edit Export ...

<input checked="" type="checkbox"/>	Name	Delivery	Bid Strategy	Budget	Last Significant Edit	Results	Reach	Impressions	Cost per Result	Quality Ad Relev
<input checked="" type="checkbox"/>	> Life Insurance	<input checked="" type="checkbox"/> In Review	Lowest cost	£10.00 Daily		70 On-Face...	20,344	31,044	£1.64 Per On-F...	
	> Results from 1 campaign ⓘ					70 On-Faceb...	20,344 People	31,044 Total	£1.64 Per On-Fa...	

# BRITISH EXPATS PENSION TRANSFERS (GLOBAL)

Campaigns [Switch to previous version](#)

Search or add filters

Campaigns 1 selected x Ad Sets for 1 Campaign Ads for 1 Campaign

Create Duplicate Edit Export ...

<input type="checkbox"/>	Name	Delivery	Results	Reach	Frequency	Cost per Result	Budget	Amount Spent	Ends
<input type="checkbox"/>	> [Redacted]	Active	52 On-Face...	18,350	2.41	£4.90 Per On-F...	£15.00 Daily	£254.68	Ongoing
<input checked="" type="checkbox"/>	> [Redacted]	Active	62 On-Face...	27,526	2.72	£4.10 Per On-F...	£15.00 Daily	£254.46	Ongoing
<input type="checkbox"/>	> [Redacted]	Active	44 On-Face...	46,117	1.43	£27.29 Per On-F...	£50.00 Daily	£1,200.61	Ongoing

# 401K ROLLOVERS

↕	Delivery	↑ Bid Strategy	Budget	Last Significant Edit	Results	Reach	Impressions	Cost per Result	Quality R Ad Relevan
<input type="checkbox"/>	<span style="color: green;">●</span> In Review	Lowest cost	\$20.00 Daily		— On-Facebook ...	—	—	— Per On-Faceb...	
<input checked="" type="checkbox"/>	<span style="color: green;">●</span> Active	Lowest cost	\$20.00 Daily		6 Leads	74	77	\$0.59 Per Lead	
<input checked="" type="checkbox"/>	<span style="color: green;">●</span> Active	Lowest cost	\$20.00 Daily		2 Leads	71	71	\$1.06 Per Lead	
<input checked="" type="checkbox"/>	<span style="color: green;">●</span> Active	Lowest cost	\$35.00 Daily		6 Leads	111	115	\$0.66 Per Lead	
<input checked="" type="checkbox"/>	<span style="color: green;">●</span> Active	Lowest cost	\$20.00 Daily		2 Leads	42	43	\$0.74 Per Lead	



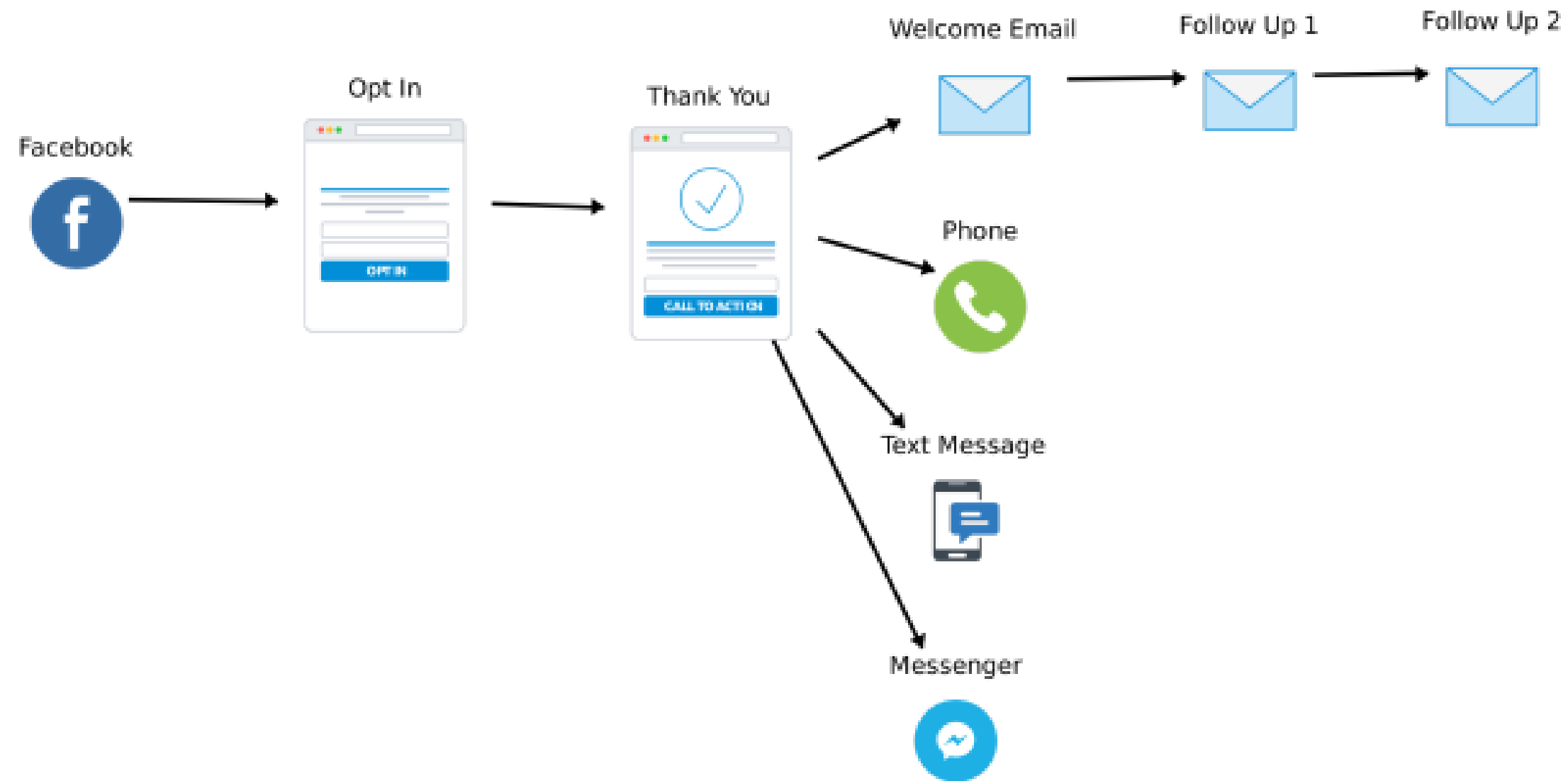
AVERAGE LEAD COSTS

**\$15 - \$100**

AVERAGE SALES CONVERSION RATES

**10 - 30%**

# A TYPICAL LEAD GENERATION SYSTEM



## WARNING! THIS ISN'T FOR..

- ✘ An Advisor who wants **instant results**.
- ✘ **New Financial Advisor / Firm** who has little capital to invest in marketing and lead generation.
- ✘ Those who aren't **willing to work hard and work with us** to perfect all aspects of the lead generation system.
- ✘ Those who **are not going to give this at least 3 months+ to get it perfected**. Rome wasn't built in a day!

WANT TO KNOW MORE?

# LET'S TALK ABOUT GROWING YOUR FIRM

E: [SUPPORT@SALESMARKETINGAUTOMATION.COM](mailto:SUPPORT@SALESMARKETINGAUTOMATION.COM)