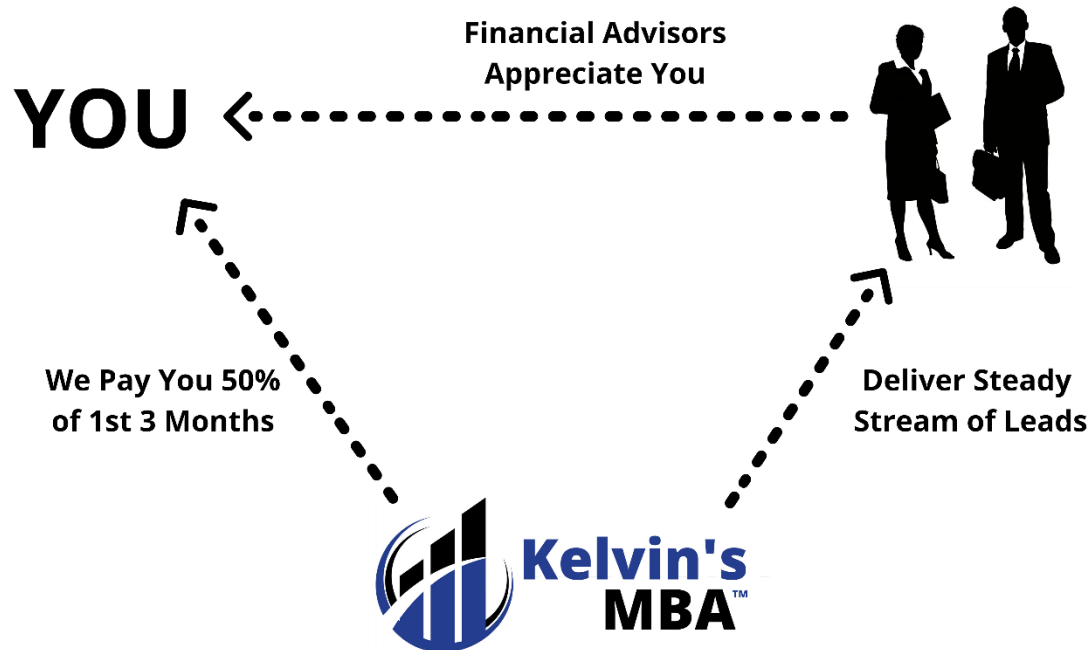


# THE DEAL – WHO WE ARE

This is a service we'd love for you to share with your audience of financial advisors.

Your financial advisors would love it too! And in return, we'll share with you 50% of our revenues from these financial advisors for the first 3 months.



We have created a [1-page summary](#), and a [video](#) and [landing page](#) that can be shared with your financial advisor clients. They detail how the service works.

I have a 30+ year background in direct marketing. I started out as the marketing director of publishing companies - which led to copywriting, deal-making, media buying - and A.I. & machine learning, LEGOs testing, "train-the-algorithm" and more.

I've recently worked on lead generation for a \$50 million/year gold company - a \$25 million/year training company - and for estate planning attorneys around the country.



The Problem

Our Solution

The Deal – Who Are We