WEALTH WATCH PARTNERS

WEALTH WATCH
PARTNERS

wealthwatchpartners.com

WELCOME!

Building and maintaining a successful financial practice isn't easy. Choosing the right partner to help along the way is critical. You will need coaching, mentoring, training, marketing, and back-office support, as well as a clear plan on how to navigate the ever-changing landscape of our industry.

Regulatory oversight, compliance, and fiduciary challenges can stifle a growing firm, but by working with a seasoned partner, these hurdles can be easily overcome. Relying on the experience of others is a great way to avoid many of the pitfalls and challenges you may encounter along the way.

Wealth Watch Partners provides these crucial components for success exclusively to elite agents and advisors nationwide. Our team of professionals will partner with you to expand your business while ensuring that you maintain the high level of fiduciary responsibility required in today's regulatory environment.

Through innovative marketing solutions, Wealth Watch Partners gives you tools to get in front of more qualified consumers than ever before. Our agents and advisors experience consistent growth, exploding revenues, and overall career success using these proven systems. We invite you to learn more about all of the benefits of partnering with us today.

ABOUT US

Wealth Watch Partners

Wealth Watch Partners is a professional IMO (Independent Marketing Organization) with a focus on assisting elite agents and advisors in taking their Life and Annuity business to the next level.

Our executive team consists of seasoned industry experts with decades of experience building and maintaining successful financial firms. We understand the daily challenges that you face in your business and can help you overcome many of these obstacles.

After all, we've walked in your shoes. It's from these years of experience and learning that we feel qualified to assist you through coaching, mentoring, training, and support.

Through several strategic relationships, Wealth Watch Partners has built a comprehensive platform to assist agents and advisors with solutions from the industry's most reputable Carriers. You can view an updated list of these companies and their solutions on our website at www.wealthwatchpartners.com.

CARRIERS

& Solutions

Wealth Watch Partners has built a comprehensive platform to assist agents and advisors with solutions from the industry's most reputable Carriers.

These Carriers are among the highest ranked firms according to many independent rating companies and offer best-in-class solutions such as:

- **ANNUITIES**
- **LIFE INSURANCE**
- **LONG TERM CARE INSURANCE**
- **MEDICARE INSURANCE**
- **DISABILITY INSURANCE**

BENEFITS OF
Partnering With Us

Working with the right partner is crucial to your ongoing success. Having a team that backs you up with knowledge, experience, and the best solutions for your clients will help you build a solid firm. We hope that you will see the benefit of using Wealth Watch Partners to assist in growing your business.

- TOP CONTRACTS
- CASE DESIGN
- TESTED MARKETING SYSTEMS
- SALES AND TRAINING EVENTS
- UNPARALLELED SUPPORT

BACK OFFICE
Support

A dedicated support team is here to assist you before the sale and after. Here are a few of the ways Wealth Watch Partners can help you streamline your business and focus on what's most important:

- LICENSING AND CONTINUING EDUCATION SUPPORT
- ENSURE PROMPTLY PAID COMMISSIONS
- CONTRACTING AND CARRIER APPOINTMENTS
- CREATIVE DESIGN & BRANDING
- MARKETING MATERIALS AND APPLICATION FORMS
- COMPLIANCE/SUITABILITY OVERSIGHT
- PENDING BUSINESS FOLLOW-UP
- THOROUGH APPLICATION REVIEW, PROCESSING, AND SUBMISSION
- ADVANCED CASE DESIGN

SOLUTIONS
We Offer

ANNUITY

FIXED-INDEXED ANNUITY (FIA):

A type of tax-deferred insurance-contract whose credited interestis linked to an equity index – typically the S&P 500 or other indices. This contract protects against a loss of principal due to market-downturns, and it guarantees a minimum interest rate when held to the end of the surrender term.

MULTI-YEAR GUARANTEE ANNUITY (MYGA):

A fixed annuity that protects against a loss of principal and guarantees a declared rate of return over the life of the contract. MYGAs are similar to bank CDs in that they offer a fixed rate of return over a specified time period, typically between 1 and 10 years.

SINGLE PREMIUM IMMEDIATE ANNUITY (SPIA):

An insurance policy that, in exchange for a single premium sum of money, guarantees the issuer will make a series of payments to the contract owner. These payments may either be level or increasing periodic payments for a fixed term of months and years or for the life of the insured.

LIFE

TERM LIFE INSURANCE:

A type of life insurance that provides temporary coverage for a declared length of time: typically 10, 15, 20, or 30 years. The insured pays a fixed rate for the length of the term. If the insured dies before the end of the term, the full death benefit is paid out to their designated beneficiaries.

FINAL EXPENSE INSURANCE:

A type of life insurance intended to cover the cost of burial and funeral expenses. Final Expense Insurance is a Whole Life Insurance plan and can be purchased later in life. Most carry small face amounts – usually between $5,000 and $50,000.

UNIVERSAL LIFE INSURANCE (UL):

A type of flexible, permanent life insurance that accumulates cash value. The cash value grows tax-deferred at an annually credited interest rate determined by the insurer. Premium payments are an amount higher than the cost of insurance, which goes toward crediting the cash value of the policy.

INDEXED UNIVERSAL LIFE INSURANCE (IUL):

A type of flexible, permanent life insurance like Universal Life but with higher upside potential. The cash value grows tax-deferred at an interest rate based on the performance of stock indices-typically the S&P 500, Nasdaq, or other international indices. Fixed IULs also provide a minimum guarantee,as determined by the insurer. Premium payments are an amount higher than the cost of insurance, which goes toward crediting the cash value of the policy.

WHOLE LIFE INSURANCE:

Whole life insurance provides coverage for the life of the insured. In addition to providing a death benefit, whole life also contains a savings component-where cash value may accumulate. Whole Life insurance policies are also-known as permanent, traditional life insurance, straight life, or ordinary life.

MEDICARE & LONG TERM CARE INSURANCE

MEDICARE SUPPLEMENT INSURANCE:

Also known as "Medigap"; A Medicare Supplement helps to cover costs that original Medicare does not cover, such as co-payments, co-insurance and deductibles. This type of insurance is offered through private insurance-companies and is typically paid for with monthly payments.

MEDICARE ADVANTAGE PLANS:

Medicare Advantage Plans replace original Medicare. These are offered by PPOs or HMOs and require individuals to use only "in-network" doctors, specialists and hospitals. Often times, these types of plans have zero-dollar monthly cost.

LONG-TERM CARE INSURANCE (LTCI):

An insurance product that is specifically designed to assist in payment of long-term care needs such as nursing home, assisted living, or personal-at-home care.

MARKETING
PROGRAMS

Marketing is a crucial component of any successful business. Every IMO claims to have the best new method for attracting clients, but usually these claims are a lot of hype with little substance. Wealth Watch Partners can save you time and money by focusing only on the programs that are producing verified results for our agents today.

If you are tired of feeding plate-lickers and are looking for an opportunity to educate qualified prospects who pay you to attend your class, the Retire Me Right program may be just what you are looking for! We will teach you how to position yourself as the teacher and go-to expert on topics that retirees are desperate to learn more about. This credibility enhances your opportunity to become their trusted advisor. Our curriculum is so extensive that it draws consumers with $300,000 or more in investable assets and are willing to pay to attend the class.

If you've ever thought about tapping into one of the industry's most lucrative niches with over $5 Trillion in assets, the 401k market may be just what you are looking for. Wealth Watch Partners has teamed up with one of the country's leading 401k prospecting, proposal, and administration firms called PCS Capital. Using their proprietary Advisor Lab software, and our customized presentations, you will easily be able to identify and market to hundreds of prospective plans in your market.

Wealth Watch Partners has teamed up with a unique lead-gen firm called SmartAsset. The SmartAsset system makes it possible for you to grow faster by directly matching you with qualified prospects in your market and delivering these leads to you on a weekly basis. SmartAsset has developed a multi-step process to ensure that they match you with high-interest leads. Through online lead capture on financial websites, SmartAsset pulls in hundreds of consumers daily who are looking for financial advice and education.

With our innovative marketing solutions, Wealth Watch Partners gives you the tools to get in front of more qualified consumers than ever before. Our agents and advisors experience consistent growth, exploding revenues, and overall career success using these proven systems.

If you are looking for an affordable way to get in front of current annuity owners without doing expensive dinner workshops, we have the answer. Wealth Watch Partners has built MyAnnuity-Facts.com, a website designed specifically for capturing leads of annuity owners looking for a better understanding of what they have. The reality is that many annuity owners never hear from their agent again after the sale. Often they are confused about what they own and have questions that can be easily answered by a true professional agent. Our agents and advisors are attracting My Annuity Facts prospects through:

- Direct Mail
- Radio Advertising
- Online Digital Marketing

If you're tired of giving seminars and are frustrated by the way they suck up your resources, you are not alone. Seminars are expensive, labor intensive, and a huge drain on our time. Unfortunately, some advisers will never grow beyond this type of marketing. They will spend the rest of their careers mailing postcards and feeding strangers. But that doesn't have to be you. In fact, by combining two proven technologies that are currently used successfully in other industries, you may never have to give another seminar again. Wealth Watch Partners has negotiated a discounted rate for our advisors who would like to use the Seminar Freedom program from Snappy Kraken. In fact, by working with Snappy Kraken our agents and advisors are also able to take advantage of their whole suite of services.

MARKETING

PROGRAMS Cont'd.

P4 Estate Planning is a turn-key dinner workshop program that consistently draws in highly qualified consumers and produces incredible results for our agents & advisors. It focuses on the following four "key" areas of estate & financial planning:

- Prepare a solid foundation for your family's estate.
- Protect your assets for today and your family's future.
- Preserve your retirement income and leave a legacy for your heirs.
- Peace of mind to enjoy your retirement knowing that the proper plans are in place.

Working through Wealth Watch Partners, you will have access to completely plug and play business model.

One of the most tried and true methods of marketing is still direct mail. Wealth Watch Partners has negotiated discounted prices with a major Direct Mail / Print-house to greatly reduce the cost of printing and mailing. You can choose from any of the selections below, or take advantage of our in-house Web/ Graphics design team who can help you design your own customized project. Wealth Watch Partners has negotiated a tremendous deal on Jumbo Postcards for only 50 cents each! This includes:

- Two-sided full color
- Thick cardstock and oversized (11" wide x 5.5" tall) postcard
- Mailing addresses that fit your parameters
- Postage included

CREATIVE
Design

Everything you need to get started!

In addition to providing contracting assistance, application review, product training, and direct access to our talented and knowledgeable office staff, we also offer an extensive suite of creative services.

BRANDING

CUSTOM LOGO

IDENTITY PACKAGE

BROCHURE

PROMOTIONAL PRODUCTS

ADVERTISING

WEB MARKETING

WEBSITE DESIGN

LANDING PAGES

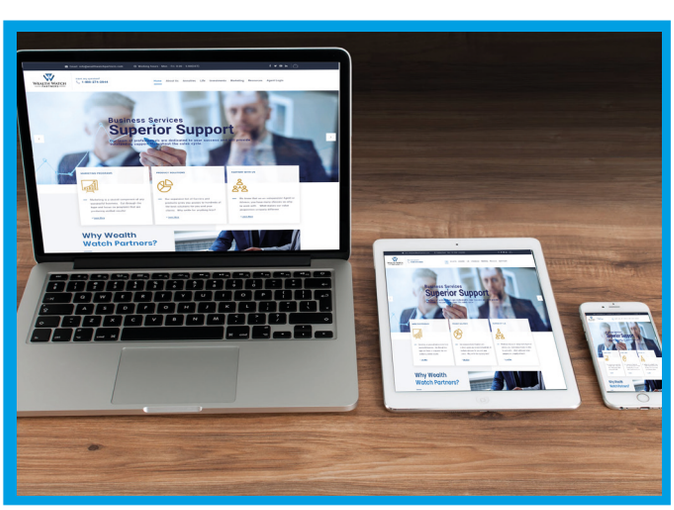
ONLINE LEAD GENERATION

SOCIAL MEDIA

NEWSLETTERS

DOODLE-DRAWINGS

VIDEOGRAPHY



GET IN TOUCH

with Wealth Watch Partners Today!

If you are ready to take your business to the next level and watch your revenues explode, you need to learn more about the opportunities at Wealth Watch Partners. Contact us today to find out more about how we can partner with you! You can reach us for more information through one of the following methods:

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