RETIREMENT RED LIGHT CHALLENGE

The Retirement Red Light Challenge is a quiz to help clients self-identify their retirement needs.

Some ways advisors successfully deploy it:

1. **Email blast to cold lists and prospect databases.**
2. **Send (email/physical mail) to prospects who have "gone cold" in 2022, especially over the holidays. Reminder why they engaged in the first place.**
3. **A pre-assessment to pinpoint the accounts and concerns that are most prevalent.**
4. **A way to qualify potential new clients.**
5. **Tucked inside a workshop folder and mentioned as a "self-assessment" for those with an advisor who wonder if they need a second opinion.**
6. **Anyone anywhere who has an advisor–digital marketing, social media, TV, radio, live events, as a referral piece, etc. Quick, easy, low pressure self-assessment.**
7. **Many advisors mention it on radio shows. "Many current clients began their journey not knowing if they needed our help, and if so, where to start. You can start right here, right now—with the Retirement Redlight Challenge"**
8. **On your television show - a lower third with call to actions to schedule an appointment or even a phone call.**
    - **"Scan the QR code"**