

SAMPLE

8 Week Email Nurture Campaign

EMAIL 1

Hello %FIRSTNAME%,

Thank you so much for connecting with us. I meet a lot of optometrists who just aren't sure where to start when it comes to financial planning & wealth management.

I can completely understand. I have a lot of clients who were in the same situation before we started working together, but they all usually shared a common theme: *they were looking to gain clarity and confidence around their finances and their financial game plan going forward.*

If you're so inclined to have a conversation, [my calendar is always available](#) and I wanted to invite you to meet with me for a brief phone call. We can talk about what's most important to you, why you reached out, and how we may be able to serve you. Nothing more unless you ask.

Thanks again for the privilege of sharing some information with you, %FIRSTNAME%. Enjoy the day!

In your service,
Adam

EMAIL 2 (ONE WEEK LATER)

Hello %FIRSTNAME%,

A lot of ODs I talk to are trying to go it alone when it comes to financial planning. Some have a need so simple that they can do it solo. Others spend hours spinning wheels until they find themselves in dire need.

I believe that hiring a professional to help you get and stay organized, hold you accountable for reaching your financial goals, and proactively watch over your plan is vital for long term financial success.

Here are just a few of the things you'll walk away from our meeting with:

- Clear around your goals
- Specific mistakes to avoid
- A clear understanding of how we work with optometrists and provide value to those we're privileged to serve.

We've been helping clients distill down complex financial strategies into easy-to-understand solutions for over 10 years and look forward to possibly helping you too!

If you're interested in learning more, I'd love to chat. [Here's a link to my calendar.](#)

I'm sure there's something that's timely and important to you...otherwise, you wouldn't have made

the initial inquiry. :)

I look forward to connecting with you soon, %FIRSTNAME%.

In your service,
Adam

EMAIL 3

Hello %FIRSTNAME%,

There are many reasons and triggers that can cause someone to reach out to a firm like ours.

One of the biggest reasons: *gathering the pieces of their puzzle.*

Our new clients usually start out by bringing to us all the pieces of their financial puzzle. They have so many statements from so many different accounts that it's hard to keep them all straight. Estate planning documents here. Investment confirmations there. Insurance policies in that cabinet. Bank statements on that website. You get the idea.

Add on top of that the possible responsibilities of running their own practice and it can very quickly all become overwhelming.

They've accumulated all of this "stuff" over the years and something usually happens that causes them to want to "put the pieces together."

If you've ever put a puzzle together, you know that there's one thing that makes it A LOT easier to put that puzzle together. What is it?

The box, of course!!

At its core, that's what creating a financial plan does: it "creates" the box.

Can you imagine trying to put all the pieces of a puzzle together, only knowing the general theme of the puzzle ("nature" or "cityscape")?! General themes in financial planning would be terms like "retirement" or "college saving" or "risk management."

You'd be able to find the corner and edge pieces, but everything after that would become a bit hazy.

At best, it would be incredibly inefficient and take a long time, caused by repeated attempts at putting the wrong pieces in the wrong place. At worst, you'd just give up and never see it through.

Wouldn't it be nice if you could construct, access, view, and manage all the "pieces of your financial puzzle" in one simple way? We can help you make that happen!

It'd be a privilege to share a conversation with you, %FIRSTNAME%, and I hope to connect with you soon.

As always, you can use the link below to schedule our no-obligation Triage Call.

In your service,
Adam

EMAIL 4

Hello again %FIRSTNAME%!

This may sound like the start of a joke, but I promise it's not:
What do fitness trainers and financial professionals have in common?

Surprisingly, a lot!

Just as a personal trainer holds you accountable to your fitness goals, a financial professional holds you accountable to your financial goals.

That's exactly what I do for my clients! I don't make up your goals for you -- you choose your own goals. It's just my job to coach you as you work toward those goals and help keep your actions in alignment with your intentions.

If you've ever tried to reach a fitness goal, you know how hard it can be to get up early, get dressed, and get to the gym. But if you have someone there waiting for you, it makes things so much easier. That added level of accountability can make all the difference. It's why people who hire personal trainers have a much higher likelihood of getting in and staying in such great shape. They have someone working on their workout plans, measuring their progress, and holding them accountable.

How do we do this for our clients in a financial way? I'd love to explain! Let's chat...you can click on the link below to view my calendar and schedule a Triage call.

If you want to learn a little more about me, here's my "Rapid Fire Q&A. (link to video on our website; screenshot below)



EMAIL 5

Hey there, %FIRSTNAME%!

It has been said that “the best teachers teach from the heart and not from a book.” I completely agree with this statement because teaching is something that is near and dear to my heart.

You see, in identifying some of the top reasons why people should work with a financial professional, I discovered that I am an educator of sorts. I view it as my job to educate my clients about important financial and economic matters that have the potential to impact their life. I take great pride in this and derive deep satisfaction from sharing my knowledge.

More importantly, I'll distill down through that information so that you not only understand the concept but more importantly how (or IF) it relates and affects your financial and/or investment plan.

While it is true that automated investing technology may be able to perform important functions (we use such technology for the benefit of our clients), it can never sit at a table with you and have a meaningful conversation. In this age of technology, we still value face-to-face (virtual or in-person) interactions with real people -- from the heart.

“An investment in knowledge pays the best interest.” -- Benjamin Franklin

Being an optometrist can bring its own unique set of planning circumstances and challenges. It's been our privilege over the years to help ODs face these challenges and questions head-on, but in a way that *brings a sense of empowerment, clarity, and progress to our clients.*

Let us know if we can help. It would be my pleasure to speak with you! Click below to request a meeting.

EMAIL 6

Hi %FIRSTNAME%,

I know the subject line of this email may sound arrogant, but I'm not speaking about myself per se. This familiar expression highlights that we've all been to different places and have experienced different things. If we can say that we've *“been there and done that,”* it means we possess experience someone else may not. In truth, that could be said about each person on this planet. We each have a unique breadth of experience.

Which brings me to another reason I believe it is important to work with a competent, qualified financial professional that knows you and the intricacies of what it means to be an optometrist.

Put simply: our breadth of experience in working with ODs means that we're able to deliver massive value to the ODs we serve.

What may be the "complete process" of a financial plan for other advisory firms is just table stakes for us. In other words, we separate ourselves from other firms out there by asking you questions and knowing of strategies that possibly neither you nor any advisory team you may be working with thought to ask.

We're able to do this because we've devoted thousands of hours over the years learning and honing our craft while serving ODs around the country.

Is there some way we can put our experience to work for you? We'll never know if we don't "kick over a few stones" and have an initial, free-flowing conversation. Feel free to reach out by clicking below to request a meeting.

EMAIL 7

Hello again %FIRSTNAME%!

I hope you're well.

It's a great feeling to know that a friend has our back, isn't it? I'm sure you have someone like that in your life -- someone who is always there to assist you at a moment's notice. We should all cherish friends and family like that!

I believe an area where it is vital to have someone like this is where financial matters are concerned. There's no denying that how well we manage our assets and cash flow has a major bearing on almost every area of life.

Plus, we're all busy! We have jobs, families, hobbies, and other things to manage.

What does that mean?

Think about it. I can't do the things that you want to do for you. Whether that's enjoying kids' sporting events, spending time with friends, traveling...doing anything that brings you joy.

I can't do those things for you while you reap the benefit.

But managing your finances? That's a different story!

We work hard so you don't have to. We proactively serve your financial needs so you can enjoy life without having to obsess over every cent. Let us do the obsessing! We do the work while you get to experience the benefit of having your plan managed on your behalf!

Whether you're still working to earn money or are retired and trying to enjoy what you've already earned, your time spent managing your assets will always be divided.

But our time is not divided.

We spend 100% of our professional time watching over what our clients have entrusted to us. It's what we do. It's all we do.

Let us take some of the responsibility off you. Interested in knowing more about how we serve ODs? Click below to view our calendar and schedule a Triage appointment.

In your service,
Adam

EMAIL 8

Hello %FIRSTNAME%,

I haven't heard from you yet in regards to connecting, though I know that sometimes schedules and priorities can change.

I'm sure this is just an oversight, but just in case you are having second thoughts about tackling this challenge, allow me to encourage you. The only way to see change is to create change.

Another way to think about it (using a quote from Einstein): *"No problem can be solved with the same mindset from which it was created."*

I have found that, while the words sound similar, there is a significant difference between "willing" and "wanting."

Everyone "wants" to be financially stable, clear on their intentions, and have confidence in their game plan going forward. Fewer are "willing" to invest the time, energy, and effort to align their intentions with their actions.

My goal is simply that: to empower and encourage optometrists around the country to achieve what they often thought was not possible. Not because they couldn't afford to implement their plan, but because they weren't sure which direction to go with their plan or which strategies and solutions were going to be in their best interest.

That's our goal and our mission...and we do it well.

It'd be a privilege to share a conversation with you, %FIRSTNAME%, and I hope to connect with you soon.

From here on out, I'll leave the ball in your court to schedule a call, but I'll keep in touch from time to time with information that I believe is helpful for those looking to make smart, informed financial decisions. You can opt-out at any time via the link below. It'd break my heart if you did, but the decision's yours and we respect your inbox. :)

As always, you can use the link below to schedule our no-obligation Triage Call.

In your service,
Adam