



Top 10 Campaign Strategies for PFR Advisors

Strategy 1: Before You Max Out Your 401(k)...

- **Target Audience:** High-income professionals (\$150K+), especially those in finance, law, or consulting
- **Pain Point:** Their 401(k) won't be enough for retirement and offers no protection if they get sick
- **Messaging Hook:**
"Your 401(k) isn't the golden ticket you think it is. We show high earners how to create tax-free retirement income *and* protect their income—even if life throws a curveball."
- **Outreach Channel:**
 1. LinkedIn direct message + connection
 2. Retargeted LinkedIn ads
 3. Email with short explainer PDF
 4. Invite to short discovery call

Strategy 2: Golden Handcuffs That Actually Work

- **Target Audience:** CEOs, CFOs, and HR leaders of companies with 5–50 key employees
- **Pain Point:** Struggling to retain top executives with basic 401(k) and healthcare benefits
- **Messaging Hook:**
"Offer a benefit your competitors *can't match*—and you don't even have to fund it fully yourself."
- **Outreach Channel:**
 1. Email >
 2. LinkedIn ad showing side-by-side comparison >
 3. Retargeting ad >



4. Calendar link for 15-min consult

Strategy 3: The \$100K Mistake Professionals Keep Making

- **Target Audience:** CPAs, attorneys, and consultants earning \$200K+
- **Pain Point:** Overpaying taxes while investing in low-return retirement plans
- **Messaging Hook:**
“If you make \$200K+ and your only retirement strategy is a 401(k) or IRA... you’re losing six figures to taxes. We’ll show you how to stop it.”
- **Outreach Channel:**
 1. Cold email with provocative subject line
 2. Retargeted landing page ad (Google/YouTube)
 3. LinkedIn DM follow-up
 4. Webinar invitation

Strategy 4: The Executive Compensation Playbook Your Competitor Doesn’t Know Exists

- **Target Audience:** Small business owners with leadership teams
- **Pain Point:** Competitors are poaching top talent with better benefits
- **Messaging Hook:**
“Most companies offer the same tired benefits. Here’s a plan that builds loyalty, protects income, and costs less than you think.”
- **Outreach Channel:**
 1. InMail >
 2. Email case study >
 3. Follow-up call or SMS >
 4. Book a strategy review



Strategy 5: Replace Term Life Insurance with a Wealth-Generating Asset

- **Target Audience:** Professionals paying into term or GUL policies
- **Pain Point:** Term life is a sunk cost with no return
- **Messaging Hook:**
“What if your life insurance could also pay you \$90K/year in retirement?”
- **Outreach Channel:**
 1. Email with visual ROI comparison >
 2. Follow-up with a client example video >
 3. LinkedIn DM or direct call

Strategy 6: The Tax-Free Retirement Vault

- **Target Audience:** Professionals and business owners age 40–60
- **Pain Point:** Seeking safer alternatives to volatile markets and tax-affected portfolios
- **Messaging Hook:**
“We help 6-figure earners build a private retirement vault—tax-free, market-protected, and 100% private.”
- **Outreach Channel:**
 1. Direct mail (luxury-style vault box) >
 2. Email with short case study >
 3. Retargeted social ads
 4. Discovery call CTA

Strategy 7: Partner Buy-Out Without Cash Flow Stress

- **Target Audience:** Professional partnerships (law, dental, CPA, medical)



- **Pain Point:** Inadequate buy-sell funding and lack of liquidity for exits or illness
 - **Messaging Hook:**
“We turn your buy-sell agreement into a wealth-building, tax-friendly plan that protects everyone involved.”
 - **Outreach Channel:**
 1. Referral partner (accountant or legal advisor) >
 2. Email with short explainer PDF >
 3. Event invite or private demo
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Strategy 8: The Doctor’s Wealth Strategy They Don’t Teach in Med School

- **Target Audience:** Physicians, especially in private practice
 - **Pain Point:** Tax burden + limited retirement strategy options
 - **Messaging Hook:**
“Your income might save lives—but it’s getting eaten alive by taxes. Here’s what financially smart doctors are doing instead.”
 - **Outreach Channel:**
 1. Paid email drop via physician association/newsletter
 2. LinkedIn DM
 3. YouTube explainer video >
 4. Follow-up calendar invite
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Strategy 9: Exit-Ready in 5 Years or Less

- **Target Audience:** Business owners ages 50–60
- **Pain Point:** Poor succession planning, unprepared for exit, tax liability



- **Messaging Hook:**
“If you’re planning to sell or retire in 5–10 years, this is your window to lock in lifetime income and slash tax liability.”
 - **Outreach Channel:**
 1. LinkedIn search + connection >
 2. Direct message w/ diagnostic tool
 3. Follow-up via email/call >
 4. Invite to strategy session
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Strategy 10: Finance Your Retirement—Like the Wealthy Do

- **Target Audience:** High-income professionals skeptical of traditional methods
- **Pain Point:** Hesitation to overfund insurance or take large risks
- **Messaging Hook:**
“Why pay for your retirement alone? Wealthy clients use banks to fund theirs—here’s how you can too.”
- **Outreach Channel:**
 1. Educational webinar >
 2. Email course drip >
 3. LinkedIn retargeting >
 4. Live Q&A or consult offer