

EVENTS:

GROW YOUR MARKET PRESENCE WITHOUT COLD CALLING

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4373038887



YOUR PRESENTERS



Kelly South

MUTUAL OF OMAHA MORTGAGE

Director of Wholesale Content and Communications

<https://www.linkedin.com/in/kellysouth0714/>

Marketing Director with 20+ years of experience in financial services, mortgage, and B2B/B2C marketing, including 10 years in the reverse mortgage industry.



Chris Figueredo

LEADING RESPONSE

National Marketing Consultant

<https://www.linkedin.com/in/chrisfigueredo/>

Chris is a graduate of Eckerd College with a degree in Business Management. He began his career at RME in event-driven marketing, where he built expertise in face-to-face engagement and live events. Today, he is a team leader and top producer, known for using events to build trust, drive leads, and deliver results.



THE OPPORTUNITY

- Why cold calling is declining (*and what's replacing it*)
- Events as a **relationship-first, education-driven** growth strategy
- Borrowers and business partners want education, not just sales
- **Education** positions you as the **expert**. **Event marketing** helps position you as the **market expert**.
- The compounding effect of consistent, small events



TYPES OF EVENTS

Consumer Events

- Homebuyer workshops
- Retirement or financial education seminars

Business Partner Events

- Realtor lunch & learns
- Financial advisor co-hosted sessions
- Be aware of RESPA!

Community Events

- Library, senior center, or chamber-hosted talks

A wooden house-shaped keychain is positioned on a document. The document contains text that is partially visible and blurred, including the words "vings", "esentations a", and "at can be us".

HOW TO PLAN AN EVENT THAT ACTUALLY CONVERTS

Picking a topic people will say yes to—consider perceptions

- “Understanding Home Equity in Retirement”
- “Using Home Equity to Age in Place”
- “Reverse Mortgage Myths vs. Facts for Seniors & Families”

Timing matters *(Spring/Summer are best)*

- Consider weather and time of year
(Holidays, election mail, Medicare enrollment)



HOW TO PLAN AN EVENT THAT ACTUALLY CONVERTS

Simple venue options

- Private or semi-private rooms preferred (no hotel ballrooms)
- Consider noise level and parking situation
- Within 15-mile radius, depending on area and traffic
- Planned and printed menu – service timing
- Audio/visual equipment
- Lunch, dinner or both
 - 5:30pm dinner events perform well

Registration tools and reminder best practices

- Reminder email/call/text
- Online registration – Constant Contact tool
- Be prepared to take phone calls – set up VM
- Confirm age and homeownership



MARKETING YOUR EVENT

- **Leveraging your existing database—do you have email addresses?**
- **Mail 5-7k for best results**
 - Results can vary but we've seen anywhere from 10 to 80 households depending on many factors, like the area, data, and venue
 - Consider age, LTV, with lien perform best
- **LinkedIn and local Meta (*Facebook*) groups**
- **Email + social promotion timelines**
 - Allow 2-3 weeks for registrations



EVENT CONTENT

- **Education-first content framework**
 - PPT available on Mutual partner portal
- **Testimonials**
- **Soft CTAs that start conversations, not pressure**
 - Steer towards a free, no obligation consultation that's personalized for their financial situation and goals
- **Compliance-friendly presentation tips**
 - Keep it high-level. Don't get into the weeds.
Must be licensed to talk rates.



POST-EVENT FOLLOW-UP THAT BUILDS BUSINESS

- The 48-hour follow-up rule
- Turning attendees into appointments
 - Ask about their goals and how/if they can see Home Equity as a way to get them there
- Nurturing non-immediate prospects
 - It might be their first exposure to Reverse Mortgages. Longer lead time but be patient and stay the course. Consistency is key.

GETTING STARTED

DO IT YOURSELF

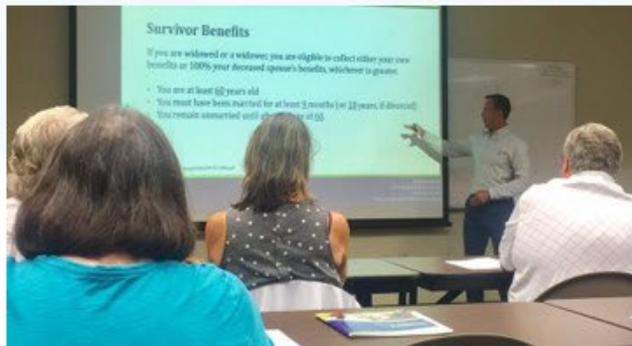
- **Co-branded Mutual mailer, flyers/brochures can add trust and credibility**
 - Mailer (New on partner portal)
 - Presentation Deck (PPT, new on partner portal)
 - Handouts/Flyers (available on partner portal)
- **Tablecloth for registration table (SDSign.com)**
- **Retractable banner stand at welcome/reception area (SDSign.com)**
- **Lead Slips to capture additional info and insights, like retirement goals**
- **Event checklist**

EVENT MARKETING COMPANY

- **Launch in 30-45 days with an event marketing company like Leading Response**
 - Data
 - Mailer Invite
 - Ads
 - RSVPs
 - Registration and check-in systems

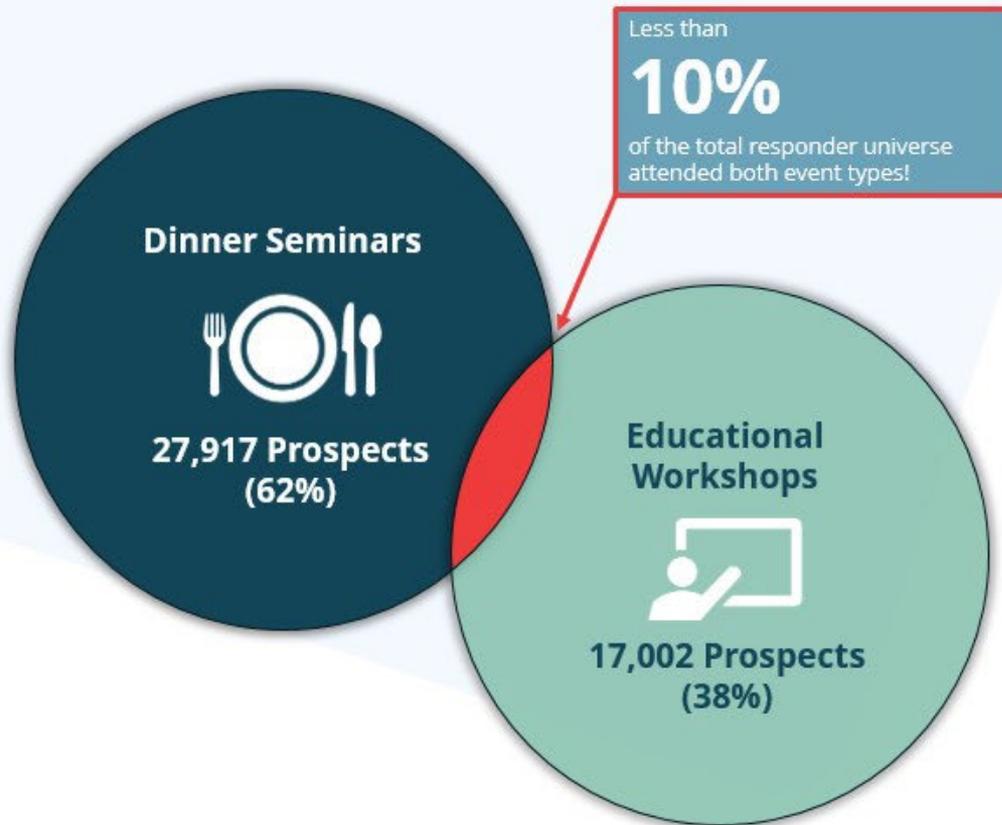
9-YEAR CASE STUDY

An Interesting Discovery: Consumer Behavior In Action



A LeadingResponse client hosted over 1,400 live events over a 9-year period. Events consisted of both dinner seminars and educational workshops. In total, these live events generated 44,919 registrations.

Dinners were more "general" in nature, focusing on 5-6 key aspects of retirement planning. The educational workshops all focused on a niche subject, e.g., Social Security Maximization or Navigating Taxes In Retirement.





SEMINAR SUCCESS®

Dinner Seminars, The Original Social Media



1+ Million
Seminar Events

Seminar Success® leverages a powerful combination of psychology and data to motivate prospects into action. It also eliminates anxiety for your audience by providing them the emotional support from their peers that they want and need.



40+ Million
Event Attendees

At the same time, you benefit through an effective and efficient way to engage, educate, and motivate people to join your firm as clients.



Data-Driven Decision Making

37,573

Total Live Events Marketed

29,353

Live Events with RSVP Service

103M+

Personalized Direct Mail Invitations

831,502

Total Responders

26,138

Dinner Events

651,581

Active Registrations

6,899

Educational Workshops

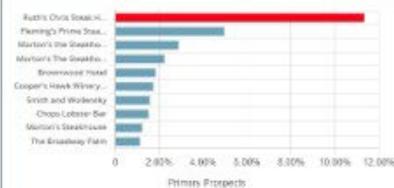
\$70.19

Average Per Responder

Top 10 Venues

January 1, 2023 - February 29, 2024

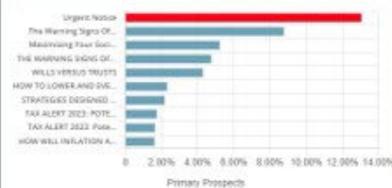
Highest Value



Top 10 Headlines

January 1, 2023 - February 29, 2024

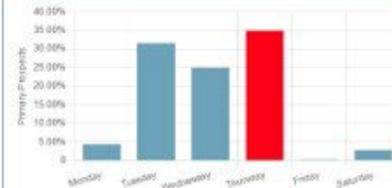
Highest Value



Most Popular Event Days

January 1, 2023 - February 29, 2024

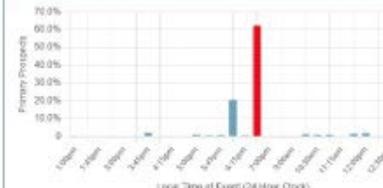
Highest Value



Most Popular Event Times

January 1, 2023 - February 29, 2024

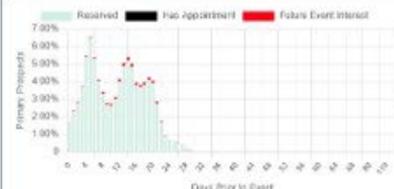
Highest Value



Response Trends Prior to Event Start

January 1, 2023 - February 29, 2024

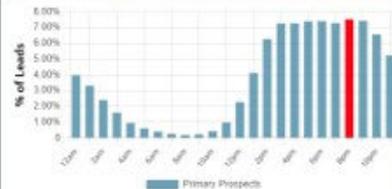
Highest Value



Time of Day Response Trends

January 1, 2023 - February 29, 2024

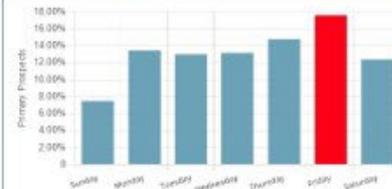
Highest Value



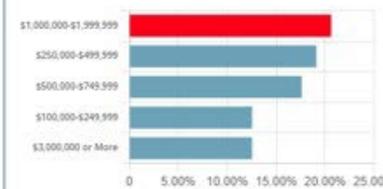
Day of Week Response Trends

January 1, 2023 - February 29, 2024

Highest Value



IPA Range



421048

THE NEW RULES TO RETIREMENT IN 2021 & BEYOND

31
Views106
Responders61/60
Reservations55/61
Attendees

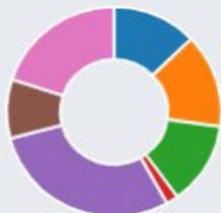
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THE NEW RULES TO RETIREMENT IN 2021 & BEYOND

9/8/2021 - 9/9/2021

TOOLS

REPORTS



IPA



Registrations Over Time



Responders by Channel

Events (2)

WEDNESDAY
SEP 8
6:30 PM

Fleming's Prime Steakhouse and Wine Bar

7250 Dallas Parkway
Plano, TX 7502445
Responders30/30
Reservations26
Attendees

FULL

PAUSE

THURSDAY
SEP 9
6:30 PM

Fleming's Prime Steakhouse and Wine Bar

7250 Dallas Parkway
Plano, TX 7502460
Responders31/30
Reservations29
Attendees

FULL

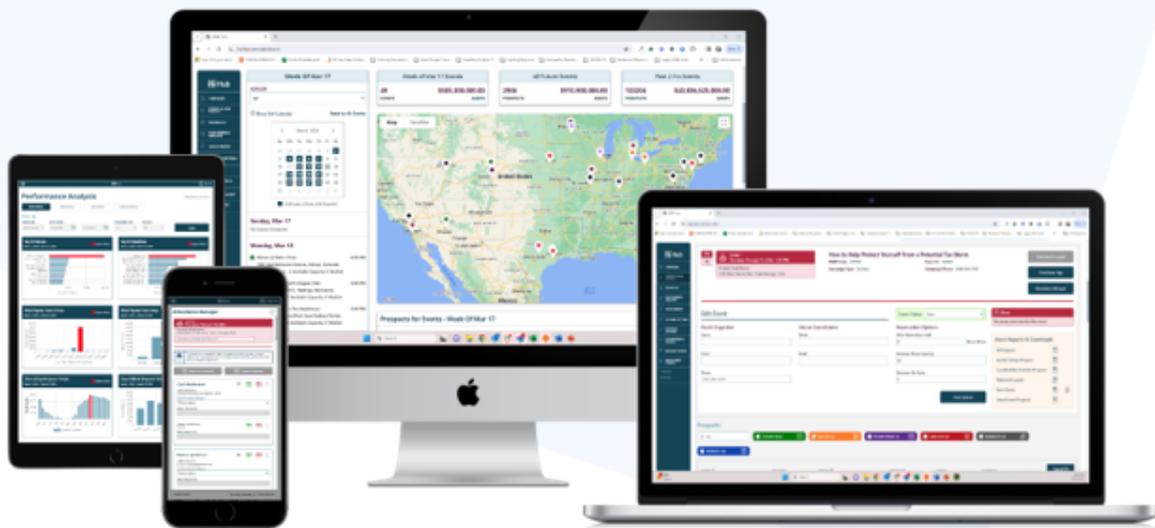
PAUSE

PROSPECT AND EVENT MANAGEMENT

Hub Technology Platform

Plug into an exciting and cutting-edge technology platform designed to help you easily manage events, communicate with prospects, and analyze your results.

- Securely access the platform from any device
- Track results in real-time
- Manage prospects and event rosters
- Send email and text message reminders
- Communicate with prospects
- Capture menu choices
- Track attendance
- Analyze campaign performance
- Seamlessly transfer data to your CRM
- And much, much more...





CHRIS FIGUEREDO

<https://www.linkedin.com/in/chrisfigueredo/>

Ph: (813)885-8234

chrisf@leadingresponse.com



LeadingResponse



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Borrower must occupy home as primary residence and remain current on property taxes, homeowner's insurance, the costs of home maintenance, and any HOA fees.

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