



# **Educational Workshop:** A Solution for Social Security-Eligible Clients



## **The Problem**

Unfortunately, many retirees fail to maximize the full potential of what Social Security can do for them. They may act impulsively and choose to start Social Security benefits as soon as they are eligible without taking the time to consider the consequences of their decision. In general, they view Social Security as complex or confusing and often avoid gaining knowledge in exchange for taking the easy route.

## **The Opportunity**

As Baby Boomers transition into retirement, many are looking to their advisor for specialized guidance on how to optimize their Social Security benefits. This presents a major opportunity for those who decide to get into the game and offer this level of advice.

## **The Solution**

For those producers who are looking to build a loyal book of clients, educating clients on Social Security is an opportunity not to be missed and educational workshops can be an effective means to that end. Educational Workshops offer an ideal solution for you to get in front of many qualified prospects in a single setting and can enhance your reputation in your community. Clients will appreciate the information, will feel more confident with their decisions and will likely be more comfortable turning to you for their retirement planning needs.

**Educational workshops can be  
an effective means to an end.**



As an industry leader for nearly four decades, SMS is proud to offer Client Stream which offers everything you need to succeed with educational workshops and includes: client-facing materials and marketing options to promote your event. Total Social Security rounds out the Client Stream program by delivering a heightened client experience. In addition, it enhances your message and brings value-added deliverables to your marketplace. Client Stream is very flexible and can be customized based on your individual needs.

SMS provides event support at levels ranging from the do-it-yourself option to a full-service, turnkey solution.

## **Do Workshops Right**

From marketing to execution, Client Stream workshops are designed to do more than attract prospects — they're designed to convert leads to lifelong clients who refer friends and family. Client Stream workshops deliver the exceptional experience that today's highly discerning consumer demands. Partner with SMS today to find the prospects that will power a steady stream of clients to grow your business.

**To discuss seminars or other  
Client Stream lead-generating programs,  
call SMS today.**

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