Getting Started

As an Annuity.com Agent you have all the marketing benefits available through the Retire Village marketing team. It's like having an entire Marketing Team on your payroll but at a fraction of the cost.

Marketing you as an expert is a big goal for us. Let's get started!
This guide is designed to help you complete your onboarding forms.

Click to Start

01 Basic Information Form

Let's Start With Your Contact Details

Tell us how to make your connections so we can boost your conversations.

Details: In everything we do, we want to lead people back to you. This is where you give us basic details like business name, address, phone, business website, etcetera. It's a simple step to complete.

02 Your Headshot Form

Upload Your Professional Headshot

Our goal is to boost your connections, so let's start with a good professional headshot!

A powerful professional headshot isn't just a photograph; it's your business's first handshake with the world. Because in a world where first impressions are digital, your headshot is the key to making them unforgettable.

Tip: *Don't let this step stop you! If you have a headshot from any other professional site or publication, we can use that for now while you consider updating your headshot later on.*

You can also use Artificial Intelligence-assisted software to help you create professional-quality headshots. A popular AI software used by many of our Agents is https://secta.ai/ but you can also search Google for AI-assisted headshots to increase your choices.

03 Your Social Media Form

Let Us Share Your Social Media Links

Organic social media is the heartbeat of a robust marketing strategy, fostering authentic connections with your audience. It's not just about visibility; it's the gateway to building trust, sparking conversations, and cultivating a community around your brand.

Tip: *If you currently have a social media account with any of these main platforms. go visit your profile and copy the URL address so you can share them with us. We are looking for your Google My Business; LinkedIn; Facebook; and/or Instagram URL.*

04 Your Database Form

Client Database

Our goal is to upload every contact you have so we can connect and grow your leads!

A well-nurtured client database is your foundation for potential income, representing a goldmine of established relationships and untapped opportunities.

Details: Databases come in all shapes and sizes. To make this download a breeze, we need columns for First Name, Last Name, Email, and Phone (optional). Just upload your database file in any one of these formats: .xlsx .xls, .csv, and we'll do the rest!

Tip: *Have more than one database file? No problem. You can upload as many database lists as you have. The bigger your database, the more potential you have for success!*
Keep in mind that purchased database lists are not accepted.

04 Your Bio/Story Form

Professional Bio

We want to share a message that elevates your credibility and attracts your ideal client.

In the financial services arena, a meticulously crafted professional bio isn't just a summary; it's your strategic tool to build credibility and distinguish yourself in a crowded market.

Details: Bios should be written in the third person. Use your name and third-person pronouns (he, she, his, hers, him, and her) rather than first-person pronouns (I and me). We recommend three paragraphs (3-4 sentences each):

-***First Paragraph:***
Where you grew up, your education, experience, how you started within the industry.
-***Second Paragraph:***
Your business philosophy, define your ideal clients and share your business goals.
-Third Paragraph:
Family, friends, hobbies. What makes you relatable to your clients? Remember to avoid repeating adjectives and cliché phrases.

Tip: *You can submit any bio you currently use but we may decide to change it up to help maximize SEO and the potential impact. If you don't have a bio, using the guidelines in the details above with Ai software and request a 2-3 three paragraph bio that is targeted to customers in search of a retirement planning professional. (We suggest using https://openai.com/).*

Congratulations!

05 Let Us Know You’re Ready to Go!

Congratulations!
You have given us what we need to go to work building your Annuity.com Marketing and Lead Building Strategy.

Make sure you complete your final Certification form that lets us know you’re ready to go!

Thank you!

Annuity.com