SocialSecurity™ Wise

Social Security Wise™

Frequently Asked Questions

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Frequently Asked Questions

The questions and answers below represent the most commonly asked questions. If you can't find an answer to your question, please contact us.

1. WHY WAS SOCIAL SECURITY WISE™ DEVELOPED?

- To help financial advisors more successfully prospect for retirement income clients. Wealth2k recognized an unmet need for a marketing/prospecting system that includes web-based marketing tools of superior quality.

2. What is the cost to subscribe?

- The cost is **$45/mo**. There is no term commitment. After 30-days you may cancel and your credit card will not be further charged. To cancel at any time after the first month, notify support@wealth2k.com.

3. What do I receive when I subscribe to Social Security Wise™?

- The Social Security Wise™ advisor-personalized, prospecting website (iPad, iPhone, and Android device compatible)
- Exclusive client Social Security multimedia presentation (viewable from your website)
- Exclusive client brochure: "*Good Decisions: Getting the Most from Social Security*" (downloadable and print-ready)
- Postcard mailer for promoting traffic to your Social Security Wise™ website (print-ready)

4. Describe the consumer prospecting strategy behind Social Security Wise™?

- In short, to get as many consumers as possible to visit your Social Security Wise™ personalized website. Social Security Wise™ incorporates the industry's finest Social Security content and delivers it to where the client wants to be met, whether that is over an iPad, iPhone, Android smartphone, desktop, or any other device with a web browser. Once the prospect is engaged at your personalized website, Social Security Wise™ uses exclusive multimedia content to deliver a motivating educational experience. The Social Security information presented will be eye-opening for many consumers. This will make it easier for the advisor to capture leads.

5. What is the purpose of the Social Security Wise™ postcard?

- The postcard is a part of the prospecting system. It may be used in a mass-mailing campaign designed to drive prospects to your personalized Social Security Wise™ website.

6. How about other ways I can generate traffic to my website?

- There's no limit. You may wish to promote your Social Security Wise™ website using an email marketing campaign. You might consider a prospecting campaign using the Google AdWords program. If you work with professional advisors such as CPAs or estate planning attorneys, you may want to ask them to refer your Social Security Wise™ website to their clients.

7. Why is the prospect urged to download the brochure from your Social Security Wise™ website?

- The objective is to create leads. Every time a prospect downloads the brochure, the advisor is notified in real-time, and the prospect's email address is captured and sent to the advisor.

8. What about the multimedia presentation?

- The movie is designed to project a super-high-quality image for the advisor and a "wow" moment for the prospect. This ignites the prospect's desire to work with an advisor on Social Security income planning.

9. Does Social Security Wise™ integrate with Social Networking sites?

- Yes. With one click you can post the movie to Twitter, Facebook and Google+. The post includes a link that takes people directly to your personalized Social Security Wise™ website.

10. How is the Social Security Wise™ website personalized?

- The advisor's name is displayed prominently on the Home page. In addition, the advisor's contact information is displayed on the website. The website URL is unique to the advisor.

11. Does my broker-dealer disclosure appear on my Social Security Wise™ website?

- Yes. When you sign-up for Social Security Wise™ you will indicate your broker-dealer disclosure language, if any. Your broker-dealer disclosure will appear on your personalized website. The postcard also provides an area where you may add your disclosure.

12. What about broker-dealer approval?

- It is the advisor's responsibility to submit the materials according to applicable broker-dealer guidelines. Wealth2k will provide FINRA review letters for the Social Security Wise™ content.

13. I am insurance licensed only. Do I need to be securities licensed to subscribe to Social Security Wise™?

- No. A securities license is not required. Of course, you must observe all regulations that apply to you when working with customers.

14. Does Social Security Wise™ include a Social Security claiming strategy calculator?

- No. Many calculators are conveniently available. Social Security Wise™ is exclusively focused on prospecting and client education. Its job is to be the "front-end" of the sales process.

15. Can more than one advisor share a single website?

- No. The license granted to use the website covers one solo-practitioner only. In offices where there are multiple advisors, each advisor must license Social Security Wise™ individually.

16. Can I add my logo to my website?

- Yes. There is a one-time charge of $100. Email your logo (in .jpeg or .png format) to support@wealth2k.com. The logo will appear in the contact information area of your website.

17. Are group discounts available?

- Offices with ten or more advisors should contact support@wealth2k.com and inquire about enterprise licensing.

18. What if I have questions about Social Security Wise™? Is there telephone support?

- Social Security Wise™ offers email support only. All questions should be directed to support@wealth2k.com Utilizing email support exclusively allows Wealth2k to keep the price of Social Security Wise™ affordable.

19. How can I track traffic to my website?

- Your website may integrate with Google Analytics, a free service from Google that provides real-time reports on visitor traffic. You may sign-up for a Google Analytics account here: http://www.google.com/analytics/. Once your Google Analytics account is established you'll be able to get your Google Analytics tracking code.

  To integrate your website with Google Analytics, login to the Social Security Wise portal with your user name and password. After login click "My Account." Next, click "Web Statistics." Enter the Google Analytics tracking code in the text box and click "Submit." It's that easy. You'll now be able to login to your Google Analytics account and view real-time reports.

20. Is the content compliant?

- Yes. The primary content e.g. ***Client Multimedia Presentation*** and ***"Good Decisions"*** brochure have been reviewed by FINRA.

21. Can I link to Social Security Wise™ from another website?

- Yes. Wealth2k provides the Social Security Wise™ logo image file that you may use to link from another website. You will find the logo in the "Downloads" section of the Social Security Wise™ advisor portal.

22. How about generating traffic to my website?

- As mentioned, Wealth2k provides a postcard mailer designed to generate visitors to your website. Your website also has a unique URL, so you may promote it in any fashion that is appropriate. Again, the movie presentation can be linked to social networking sites.

23. Can I use the Social Security Wise™ brand in my own marketing materials?

- No. Unless Wealth2k provides written permission, usage of the Social Security Wise™ brand and trademark in any self-created materials is strictly prohibited.

24. Can the website content be changed?

- No. Content cannot be modified.

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