Legacy Wealth Management: Puerta Vallarta April 2025

Busath Films Content Booth Doc:

Script options for video ads

Script option 1:
Main proven script strategy: Navigating your financial future can be overwhelming, especially during major life changes like preparing for retirement, growing your family, selling a business, or managing market uncertainty. How do you ensure your investments are optimized and your financial goals become reality? I'm [Advisor's Name], a Senior Wealth Advisor at Legacy Wealth Management. I go beyond numbers to understand your goals, values, and unique circumstances. Together, we'll create a personalized strategy—whether you're saving for your children's education, planning for retirement, or seeking confidence in your financial decisions. Ready to take control of your future? Schedule a complementary asset review. Let's build a financial future you can feel excited about.
Script option 2:

Tax-Efficient Strategies

Hook:
"Is your wealth being eroded by taxes? Let's change that."

Problem:
"Taxes can eat away at your hard-earned wealth, but most people don't know there are strategies to help protect their assets from high tax burdens."

Solution:
"Legacy Wealth Management uses tax-smart strategies to help you minimize tax liabilities and maximize returns. Whether managing capital gains or planning for retirement, we ensure that you're keeping more of what you earn."

CTA:
"Want to keep more of your money? Contact Legacy Wealth Management today and start planning a tax-efficient future."

Script option 3:

Preparing for Market Volatility

Hook:
"Can your portfolio weather the next market storm?"

Problem:
"Market volatility can make even the most seasoned investor nervous. If your wealth is tied to traditional investment strategies, you could be exposed to unnecessary risk."

Solution:
"At Legacy Wealth Management, we design portfolios built to weather any storm. Our approach blends traditional investments with alternative assets to provide better protection in times of market uncertainty."

CTA:
"Don't wait for the next downturn. Contact us today to learn how Legacy Wealth Management can help stabilize your financial future."

Script option 4:

Estate and Generational Wealth Planning

Hook:

"How will your wealth impact future generations?"

Problem:
"Many people neglect to plan for the long-term, leaving their wealth vulnerable or poorly managed for future generations."

Solution:
"Legacy Wealth Management helps you create a plan that ensures your wealth is passed down efficiently, protecting your assets and securing your family's future. From estate planning to tax-efficient trusts, we've got you covered."

CTA:
"Start building a legacy today. Contact Legacy Wealth Management and find out how we can help preserve your wealth for the generations to come."

Script option 5:

Diversification Beyond Stocks and Bonds

Hook:
"Is your investment portfolio truly diversified?"

Problem:
"Many investors only focus on stocks and bonds, which can leave them exposed to market risk. True diversification includes alternative investments that offer stability and growth potential."

Solution:
"Legacy Wealth Management offers access to alternative investments such as private equity, real estate, and more. We create a diversified strategy that goes beyond the traditional portfolio, protecting you from market volatility and offering growth potential."

CTA:
"Want a portfolio that works harder for you? Reach out to Legacy Wealth Management and learn how to diversify your investments today."

Script option 6:

Retirement Planning with Legacy Wealth Management

Hook:
"Are you prepared for retirement?"

Problem:
"Retirement planning isn't just about saving—it's about creating a strategy that ensures your wealth lasts and grows in retirement. Are you

confident your current plan will see you through?" Solution: "At Legacy Wealth Management, we specialize in retirement strategies that are designed to protect your income, minimize taxes, and ensure your wealth continues to grow throughout retirement." CTA: "Start your retirement plan today with Legacy Wealth Management. Get in touch now to create a strategy tailored to your future.

Script options for other videos (social media, emails, website, etc.)

Video Scripts:
Script 1:
Where Should I Invest My Money? Where should you invest your money? It's a big question, but the answer depends on *your* goals—whether it's saving for retirement, buying a home, or planning an unforgettable trip. The good news? There are different investment platforms for each goal. For example: ● 401(k)s and IRAs: These "qualified" accounts offer tax benefits as your investments grow but come with rules like penalties for early withdrawals. ● Brokerage accounts: These "non-qualified" accounts don't have the same tax perks but give you greater flexibility—you can withdraw funds anytime. So, which is right for you? It depends on your needs. Qualified accounts may be great for long-term goals, while non-qualified accounts provide easy access to your money. We offer resources to help you dive deeper into each option and figure out the best strategy for you. Ready to start your journey? Reach out to us today to align your investments with your financial goals.
Script 2:
Why Should I Consider Investing? Imagine your money working for you—earning more day by day. That's the power of investing. Think of it like planting a tree. A savings account is like planting a tree but never watering it—it stays the same. Investing? That's like adding a sprinkler system. Your tree grows, thrives, and bears fruit over time.

How? Through stocks, bonds, real estate, and more. But every journey is unique, depending on:

1. Income: Even small seeds grow into mighty trees. No matter your income now is a great time to start.
2. Age: Starting early has advantages, but it's *never* too late to begin.
3. Risk tolerance: How well can you weather market ups and downs? We'll help you find the right mix of investments for your goals and comfort level.

Every investment starts with that first dollar. Let us help you plant the seed and watch your wealth grow. Contact us today to build your personalized strategy and start your journey.

Script 3:

Financial Planning Process

Working with a financial advisor doesn't have to feel overwhelming or full of confusing jargon. We believe in simplifying the process and empowering you.

Our #1 client question? "Am I doing okay?" To answer that, we've developed a simple, five-step process:

1. Get to know you: Everyone's situation is unique, so we'll uncover your goals, concerns, and what drives you.
2. Simplify and organize: Before planning, we'll help you get your financial house in order and take steps to simplify.
3. Create a plan: Together, we'll design a personalized roadmap to tackle your specific challenges.
4. Take action: A plan only works if it's implemented, so we'll support you in building momentum toward success.
5. Review regularly: Life changes. That's why we focus on ongoing planning and adapting as your needs evolve.

Let's talk about how we can guide you toward financial success. Think of us as your partner on the journey to wealth and freedom. Ready to start? Let's connect.

Script 4:

The Importance of Tax Planning
Hook:
"Are taxes eating into your investment returns? Let's talk about how you can keep more of your money."

Content:
"Taxes are one of the biggest threats to your wealth, but most people don't have a solid strategy to minimize their tax liabilities. The right tax planning can make a huge difference in your long-term financial success. Whether it's tax-advantaged accounts, capital gains strategies, or tax-efficient investing, there are ways to minimize what you owe without breaking the law."

CTA:
"Ready to take control of your taxes? DM me for more info on how to reduce your tax burden today."

Script 5:

Estate Planning: Why It's Not Just for the Wealthy

Hook:
"Think estate planning is only for the super-rich? Think again."

Content:
"Estate planning is crucial for everyone, no matter your net worth. It’s not just about passing on your wealth—it's about protecting your family, ensuring your wishes are carried out, and minimizing taxes when your assets are passed down. A well-structured estate plan gives you peace of mind and ensures your loved ones are taken care of."

CTA:
"Don’t wait. Start your estate planning today. Contact me to learn how easy it can be."

Script 6:

Diversification Beyond Stocks and Bonds
Hook:
"Is your portfolio truly diversified? Stocks and bonds alone may not cut it."

Content:
"Many investors only focus on stocks and bonds, but true diversification goes beyond that. Alternative investments like real estate, commodities, and private equity can help shield your portfolio from volatility and give you more growth opportunities. If you’re only focused on traditional investments, you might be missing out on the benefits of diversification."

CTA:
"Want to learn more about diversifying your investments? Reach out to me for a personalized strategy."

Script 7:

How to Plan for Retirement in Uncertain Times
Hook:
"Retirement planning isn’t about ‘if’ anymore—it’s about ‘when’ and ‘how.’ Let’s prepare for the unexpected."

Content:
"Retirement planning is tricky in today’s uncertain world, but the key is to have a flexible strategy. That means diversifying your portfolio, considering inflation, and planning for healthcare expenses. But most importantly, it means having a plan that can adapt to whatever comes your way—whether it’s a market downturn or unexpected expenses."

CTA:
"Want a retirement plan that can adapt to change? DM me and let’s start building a strategy for your future."

Script 8:

The Power of Compounding Interest
Hook:
"Want your money to work harder for you? Let’s talk about the magic of compounding."

Content:

"Compounding interest is one of the most powerful tools in building wealth, but it requires time and patience. The earlier you start saving and investing, the more you'll benefit from compounding. Think about it: a dollar invested today could be worth much more in the future. The key is to be consistent and disciplined."

CTA:
"Want to see how compounding could work for you? Let's chat and create a plan that takes advantage of this powerful strategy."

Script 9:

Why You Need a Financial Advisor
Hook:
"Are you still trying to manage your finances on your own? Here's why you might want to reconsider."

Content:
"Many people think they can handle their financial planning themselves, but there's so much more to it than just choosing stocks. A financial advisor provides expert guidance on tax strategies, retirement planning, estate planning, and investment diversification. If you want to grow and protect your wealth, you need a team that can help you make smart, informed decisions."

CTA:
"Ready for professional financial advice? DM me, and let's talk about how I can help you achieve your goals."

Script 10:

Protecting Your Wealth from Market Volatility
Hook:
"Is your portfolio prepared for the next market downturn? Let's talk about protecting your wealth."

Content:
"Market volatility is inevitable, but the right strategies can help you weather the storm. Diversifying your investments and including safer, stable assets in your portfolio can help protect your wealth when the market gets unpredictable. The key is to have a plan in place that focuses on long-term growth while managing risk."

CTA:
"Want to protect your wealth from the next downturn? DM me to find out how to stabilize your portfolio."

Script 11:

Setting Financial Goals: The Key to Success
Hook:
"Do you have clear financial goals? If not, you're missing out on the roadmap to success."

Content:
"Setting specific, measurable financial goals is crucial to achieving financial success. Whether it's saving for a home, building an emergency fund, or planning for retirement, having clear goals helps you stay focused and motivated. A financial advisor can help you break down your goals into actionable steps and ensure you're on track to meet them."

CTA:
"Need help setting financial goals? Reach out, and I'll guide you through the process."

Script 12:

Why Financial Literacy Matters
Hook:
"Do you understand how your money works? Let's talk about why financial literacy is key."

Content:
"Financial literacy isn't just about knowing how to budget—it's about understanding how to make your money work for you. From investing to tax planning, understanding the basics can empower you to make better decisions and avoid costly mistakes. Financial education is the first step toward building wealth and securing your future."

CTA:
"Want to learn more about how money works? DM me for helpful tips and resources to get started."

Script 13:

Retirement Savings: How Much Is Enough?
Hook:
"How much should you save for retirement? Let's break it down."

Content:
"Figuring out how much to save for retirement can be overwhelming, but it's easier when you have a strategy. The rule of thumb is to save at least 15% of your pre-tax income, but that's just the starting point. The amount you need depends on your lifestyle goals, when you want to retire, and how much you want to spend in retirement."

CTA:
"Not sure how much you need to save? DM me, and let's create a retirement savings plan that works for you."

Script 14:

Protecting Your Wealth During Life's Changes
Hook:
"Life changes. Is your financial plan ready for the unexpected?"

Content:
"Life events like marriage, divorce, buying a home, or starting a family can dramatically impact your finances. That's why it's important to have a flexible plan that can adapt to life's changes. A financial advisor can help you navigate these transitions, ensuring that your wealth stays protected and your financial goals stay on track."

CTA:
"Need help adjusting your financial plan? DM me, and let's review your options."

Script 15:
The Importance of Building Emergency Savings **Hook:** "Are you prepared for a financial emergency? Here's why you need an emergency fund." **Content:** "Life is full of unexpected twists, and having an emergency fund is crucial for financial security. Whether it's an unexpected medical expense, a job loss, or a car repair, having an emergency fund can prevent you from dipping into your investments or going into debt. Aim to save at least three to six months' worth of living expenses." **CTA:** "Not sure how to start an emergency fund? DM me, and I'll help you set up a savings plan that gives you peace of mind."

Interview questions

General info:
• These questions and scripts are here to spark ideas for the content we can create together. They're just a starting point—if you have your topics or timely video ideas in mind, we'd love to bring those to life too! • We recommend unscripted answers for a more authentic feel but feel free to use the scripts as needed. You're welcome to copy them into another document and customize them however you'd like!
Questions:
Question 1:
"What does true diversification mean for your investments?" Explain alternative asset classes and how they help mitigate risk during market downturns.
Question 2:
"Should you be worried about taxes eating away your wealth?" Discuss tax-smart investing strategies to maximize returns.
Question 3:
"What's the secret to navigating financial market volatility?" Highlight the importance of downside protection and tactical management strategies.
Question 4:
"Is your financial advisor working with a team behind them?" Talk about the value of having a dedicated team with expertise in investment, tax, and risk management.
Question 5:

"Why isn't buy-and-hold always the best strategy?" Provide insights into active investment strategies to capture market upsides while reducing losses.
Question 6:
"Is your portfolio ready for the unexpected?" Discuss risk management and preparing for economic or personal financial challenges.
Question 7:
"What's the difference between an average financial advisor and a Legacy advisor?" Explain how Legacy Wealth Management's personalized service and alternative investments set them apart.
Question 8:
"How do you know when it's time to adjust your financial plan?" Cover life milestones or economic signals that warrant revisiting a financial plan.
Question 9:
"What are the biggest mistakes people make with retirement planning?" Share common pitfalls and how to avoid them.
Question 10:
"Are you prepared for a market downturn?" Offer advice on protecting wealth and maintaining financial goals in challenging economic times.
Question 11:
"What is your financial health checkup missing?" Encourage viewers to reassess their strategies for hidden gaps, such as underinsurance or missed tax benefits.
Question 12:
"How can private equity or real estate enhance your portfolio?" Discuss the benefits of alternative investments beyond stocks and bonds.
Question 13:
"What's the value of financial coaching for families?" Explain how Legacy Wealth Management helps families navigate financial decisions for generational wealth.
Question 14:
"How can you turn wealth into a tool for what matters most?" Highlight Legacy's philosophy of using money to achieve personal and family goals.
Question 15:

"What's your biggest question about building wealth?" Invite engagement by answering FAQs or addressing common concerns viewers might have.

Backdrop 1:
Backdrop 2:
Backdrop 3:
Backdrop 4:
Backdrop 5:
Backdrop 6:
Backdrop 7:
Backdrop 8:

Tips for great content

Tips

• Do you have a lead magnet? A lead magnet is a free resource or information product you offer to prospects in exchange for their email—helping you build trust, start a relationship, and share more about what you do.
  ○ If you don't have one yet, your organic social feed can serve as your lead magnet!
• Switch up your outfits or backdrops every 5–6 videos to keep your content fresh and visually engaging.
• Be Yourself:
  ○ Think about what you want to say, but don't stress over scripted answers. Just be yourself! We'll have a conversation, and that makes the content feel more natural and approachable, helping prospects connect with you.
• Tell Stories:
  ○ If you have a personal or client story, share it! Stories make complex ideas relatable and help prospects see how you've helped others navigate their financial journey. It's a great way to build trust.
• Be Concise and Actionable:
  ○ In 90 seconds, keep it short and to the point. Deliver clear, actionable advice that viewers can easily apply. Focus on one valuable tip rather than trying to cover too much.

Disclaimer:

(NAME OF THE ADVISOR) is an employee/contractor of Legacy Wealth Management, LLC. He was not provided compensation above his normal compensation to provide the testimonial in this video, but as an employee/contractor, he has an interest in generating new business for the firm. You should be aware of this conflict and judge the statements made with that understanding.

The information contained herein is provided for educational purposes only and the information should not be construed as a provision of personalized investment advice. Under no circumstances should this information be construed as an offer to sell or a solicitation of an offer to buy a particular product or service. An offer can only be made by a private placement memorandum in connection with any offering of securities.