

New Financial Advisor First 100 Days Engagement

Here's a structured 100-day touchpoint system to nurture the financial advisor relationship, stay top of mind, and generate more referrals:

Week 1: Initial Engagement & Value Introduction

- **Day 1:** Send a personal thank-you email recapping your solutions meeting, reinforcing key points, and expressing excitement about working together.
- **Day 3:** Mail a physical book or high-value article on how reverse mortgages enhance retirement planning.
- **Day 5:** Call to confirm they received the book/article and discuss any questions. Ask about a current client scenario where a reverse mortgage might fit. Focus on the

Week 2-4: Building Awareness & Credibility

- **Day 10:** Send a video email with a success story of a financial advisor helping a client with a reverse mortgage. Highlight the scenario using the HECM Tool doing screen capture video.
- **Day 15:** Invite them to a short, private Zoom session to review case studies or answer their client questions.
- **Day 20:** Share a one-pager with *"5 Myths About Reverse Mortgages Every Advisor Should Know."*
- **Day 25:** Send a 9-word email. Subject: The financial advisor's first name. Body: Are you working with anyone that could benefit from eliminating their mortgage payment with a reverse mortgage?

Week 5-8: Strengthening Relationship & Encouraging Action

- **Day 30:** Send a short video (recorded personally or pre-made) explaining a unique advantage of reverse mortgages. Book a business planning meeting coffee or lunch.

- **Day 35:** Share an article on tax efficiency and reverse mortgages, tying it to their practice.
- **Day 40:** Call to ask if they've come across any clients who could benefit and offer to assist.
- **Day 45:** Send a client testimonial or case study.
- **Day 50:** Mail a handwritten note sharing excitement to expand business together.

Week 9-12: Securing Referrals & Deepening Partnership

- **Day 60:** Invite them to a private webinar on advanced reverse mortgage strategies.
- **Day 70:** Send an email with a *"Reverse Mortgage Quick Reference Guide"* tailored for advisors.
- **Day 80:** Book and perform another partnership planning meeting.
- **Day 90:** Offer a co-branded resource (e.g., a white paper, email template, or event).
- **Day 100:** Schedule an in-person or Zoom check-in to review progress and refine strategy.