

# Leveraging Artificial Intelligence (AI) for Marketing Your Practice



# Why Should You Bother Marketing?

**\$36/\$1**

**For Email Marketing**

**246 Million**

**Social Media Users in the US**

**2 Hours**

**A Day on Social Media**

# The Significance of Marketing



**Build Brand  
Awareness**

# The Significance of Marketing

**Generate  
Leads**



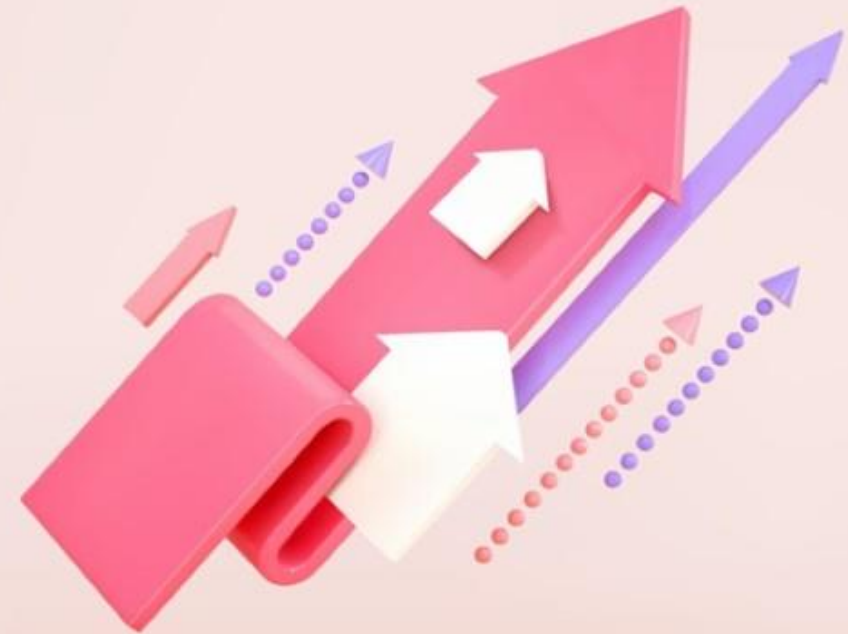
# The Significance of Marketing



**Establish  
Authority**

# The Significance of Marketing

**Increase  
Client  
Retention**



# The Significance of Marketing



**Differentiate  
Yourself**



# The Significance of Marketing

**Adapt to  
Market  
Changes**



# What is ChatGPT?

Understanding this AI tool



**“I’m an AI created by OpenAI to chat with you, help with questions, and more!”**



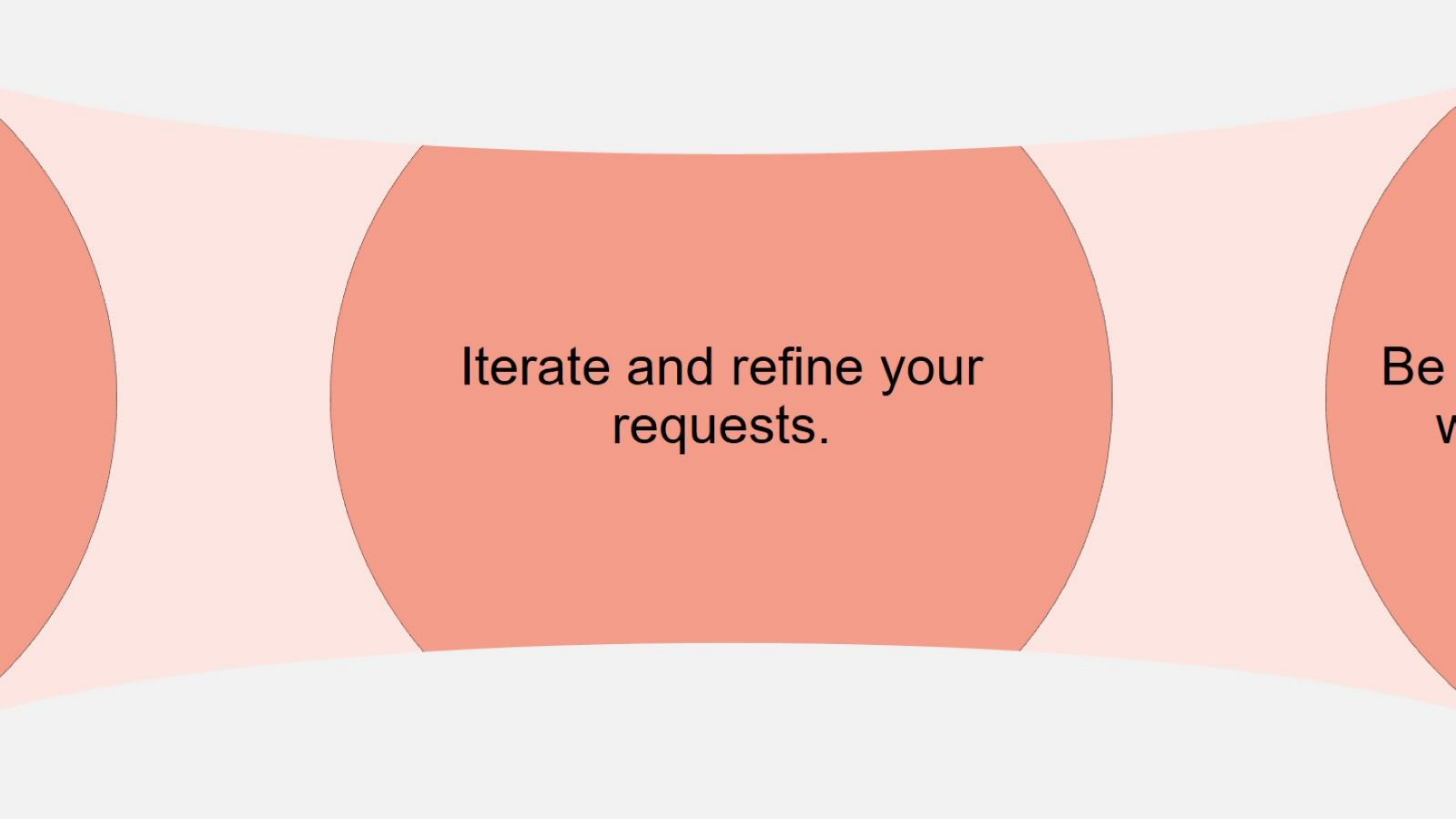
**“If I seem human-like in my responses, it's because I've been trained on vast amounts of human-written text to learn patterns and nuances of language.”**

Things to

Remember

our

Be mindful of bias and  
accuracy.



Iterate and refine your requests.

Be  
v

ur

Be ethical and mindful in the way you utilize this tool.

A



ul in the  
tool.

AI is meant to assist, not  
replace.

Yo

not

You are the one teaching it  
how to help you.

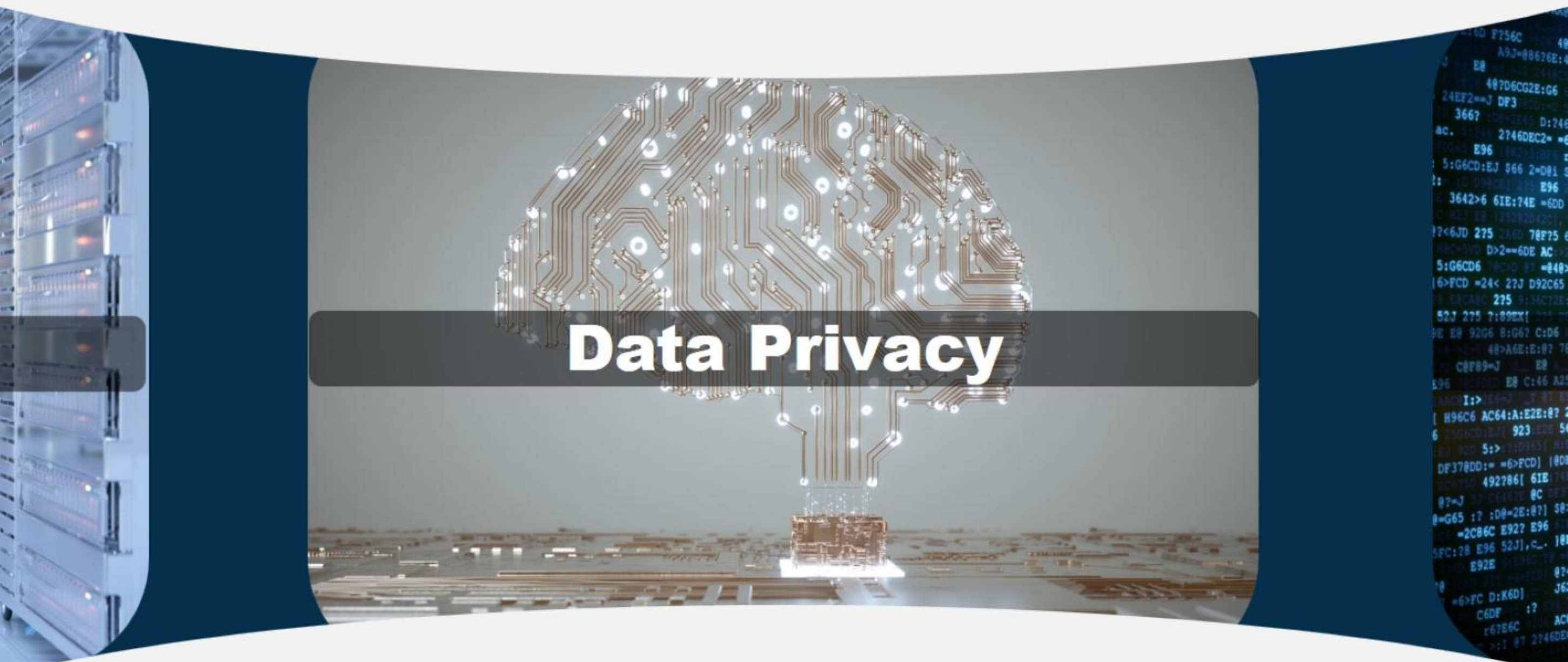
Set cle  
AI

ching it  
d.

Set clear objectives for your  
AI and give it specific  
prompts.

B

WARNINGS



# Data Privacy

```
F756C 48  
A9J=88626E:4  
E8  
487D6CG2E:G6  
24EF2==J DF3  
3667 D:246  
ac. 2746DEC2= =6  
E96  
5:G6CD:EJ 566 2=D81  
3642>6 6IE:74E =6DD  
72<6JD 275 2A6D 78F75  
5:G6CD6  
[6>PCD =24< 27J D92C65  
52J 275 7:89EX  
E8 9206 8:G67 C:D6  
C8F89=J  
E96  
I:>7E6=7  
H96C6 AC64:A:E2E:87  
6 923  
DF378DD:= =6>PCD [ 80  
492786[ 6IE  
@7=J  
=G65 17 :D8=2E:87] 58  
=2C86C E927 E96  
SFC:78 E96 52J], c. 18  
E92E  
=6>FC D:K6D]  
C6DF :?  
r67E6C  
>:1 87 2746DE
```

# SEO Penalties





# Misinformation

# **Social Media and Emails**

**How to Use AI in Your Practice**



# Social Media



Many Options for platforms

Pull Content from Articles

Check the hashtags

Have fun!



How can I help you today?

**Make up a story**

about Sharky, a tooth-brushing shark superhero

**Write a message**

that goes with a kitten gif for a friend on a rough day

**Suggest fun activities**

to do indoors with my high-energy dog

**Help me pick**

a birthday gift for my mom who likes gardening

Message ChatGPT...



**Upgrade plan**

Get GPT-4, DALL-E, and more





How can I help you today?

A large, empty, rounded rectangular input field for user text, with a small upward-pointing arrow icon in the bottom right corner.

 **Upgrade plan**  
Get GPT-4, DALL-E, and more



## You

make 3 short social media posts for this article. I am a retirement plan advisor trying to disperse important information about retirement to plan sponsors and position myself as an authority in the retirement space: [copy + paste article]



## ChatGPT

🌟 Attention plan sponsors! 🚀 Senators Cassidy and Kaine introduce the Helping Young Americans Save for Retirement Act. Discover how this could impact your 401(k) plans and your employees' financial future. #RetirementPlanning #401k 📁

💡 Exciting updates in retirement legislation! Senators Cassidy and Kaine propose changes to 401(k) plans, allowing employees as young as 18 to contribute. Stay informed about the potential impacts on your organization and your team's financial wellness. #RetirementSavings #FinancialFuture #InvestInTomorrow 🚀

📣 Calling all plan sponsors! Senators Cassidy and Kaine's retirement bill could revolutionize 401(k) plans. 🚀 Explore the details to understand how these changes might shape your company's retirement offerings and your employees' savings strategies. #RetirementLegislation #RetirementIsComing



Upgrade plan

Get GPT-4, DALL-E, and more

Message ChatGPT...



# What to take note of:

## Repetitive Language and Emojis

Unveiling

: Dive into

Stay informed, stay empowered! 🚀 📈 #Retireminute #RPAG #RetirementPlanning  
#PortalUpgrades

Unlock

🚀 Maximizing Benefits: A Peek into Regular Performance Checks 🚀

🌟 Elevate Your Benchmarking Game with RPAG! 🌟

👤 Engaging Senior Leaders

Explore

Elevate y

Share these tips for effective benefits management! 👤 🚀

🚀 Portal Perks Alert! 🚀

🎯 Innovative Financial Planning 🎯

Revolutionize

🚀 RPAG Scoop Highlights 🌟

Discover

# How to Utilize AI for Email Marketing

# Subject Lines

# Cold Emails



# Warm Emails

# Retention Emails

# Subject Lines

- Goal
- Tone
- Details



How can I help you today?



**Upgrade plan**

Get GPT-4, DALL-E, and more





## ChatGPT

1. Elevate Your Retirement Plan: Introducing Personalized Online Advising!
2. Enhance Participant Engagement: Introducing 1-on-1 Online Advising Sessions
3. Take Your Retirement Plan to the Next Level with Personalized Online Guidance
4. Drive Participant Success: Introducing Virtual 1-on-1 Advising for Your Plan
5. Maximize Participant Benefits: Introducing Online Advisory Services
6. Empower Your Participants: New Online Advising Service Now Available!
7. Boost Participant Confidence: Introducing Virtual 1-on-1 Advising Sessions
8. Invest in Your Participants' Futures: Introducing Online Advisory Support
9. Revolutionize Participant Experience: New Online Advising Platform Unveiled!
10. Personalized Guidance at Your Fingertips: Introducing Online Advising for Your Plan



### Upgrade plan

Get GPT-4, DALL-E, and more

Message ChatGPT...



# Cold Emails

- Specificity
- Audience
- Proofread
- Conciseness



How can I help you today?



**Upgrade plan**

Get GPT-4, DALL-E, and more





## ChatGPT

Subject: Exploring Optimal Retirement Solutions for [Company Name]

Dear [Prospect's Name],

I hope this message finds you well. My name is [Your Name], and I am a seasoned Retirement Plan Advisor with [Your Company Name]. I recently came across [Prospect's Company Name] and was impressed by your commitment to providing comprehensive benefits to your employees.

I understand the importance of offering a robust and tailored retirement plan to attract and retain top talent. In my role, I have successfully assisted numerous companies like yours in optimizing their retirement programs to align with both organizational objectives and employee needs.

I would appreciate the opportunity to discuss how our expertise and personalized approach can benefit [Prospect's Company Name] specifically. By conducting a brief consultation, we can identify areas for improvement or optimization in your current retirement plan, ensuring it remains competitive and compliant.

Please let me know a time that suits you for a brief call or meeting. I am

Message ChatGPT...



Upgrade plan

Get GPT-4, DALL-E, and more





## ChatGPT

Subject: Enhancing Your Retirement Plan at [Company Name]

Dear [Prospect's Name],

I trust this message finds you well. I'm [Your Name], a Retirement Plan Advisor at [Your Company Name]. Impressed by [Prospect's Company Name], I believe our expertise can optimize your retirement plan.

I'd appreciate a brief call to discuss tailoring a solution for [Prospect's Company Name]. When is a convenient time for you?

Best regards,

[Your Full Name]

[Your Position]

[Your Contact Information]

[Your Company Name]

Message ChatGPT...



Upgrade plan

Get GPT-4, DALL-E, and more



# Warm Emails

- Foundation
- Edit
- Read Aloud



How can I help you today?

A large, empty, rounded rectangular input field for user text, with a small upward-pointing arrow icon in the bottom right corner.

 **Upgrade plan**  
Get GPT-4, DALL-E, and more





## ChatGPT

Subject: Continuing the Conversation: Enhancing Financial Wellness for Target

Hi John,

I hope you're doing well since our chat last week. I'm excited about the potential partnership between RPAG and Target to enhance financial wellness for your participants.

Our tailored solutions are designed to empower employees to make informed financial decisions, contributing to their overall well-being and productivity.

Could we schedule a quick call to discuss how RPAG can further support Target's financial wellness goals?

Looking forward to it.

[Insert Sign Off]



### Upgrade plan

Get GPT-4, DALL-E, and more

Message ChatGPT...



# Retention Emails

- Confidence
- Informative
- Helpful
- Supportive



How can I help you today?



**Upgrade plan**

Get GPT-4, DALL-E, and more





## ChatGPT

Subject: Important Update: Retirement Plan Limits for [Year]

Dear [Client's Name],

I hope this email finds you well. As your dedicated Retirement Advisor, I'm committed to keeping you informed about important updates that may impact your retirement plan. Today, I wanted to bring your attention to the latest retirement plan limits for [year].

Understanding these limits is crucial for effective retirement planning and ensuring compliance with regulatory requirements. Here are the key limits for [year]:

### 401(k) Contribution Limits:

The elective deferral (contribution) limit for employees participating in 401(k), 403(b), most 457 plans, and the federal government's Thrift Savings Plan remains at [\$XX,XXX] for [year].

Catch-up contributions for those aged 50 and over remain at an additional [\$X,XXX] for [year].

### Defined Contribution Plan Limits:

The annual limit on total contributions to defined contribution plans increases to [\$XX,XXX] for [year].

IRA Contribution Limit:



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**POP QUIZ**





# RPAG

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38 views · 5 days ago



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103 views · 2 weeks ago



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29 views · 3 weeks ago



Principal Differentiators | So Much More Than DC  
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RPAG National Conference 2023 | Highlights & Moments  
24 views · 1 month ago



PIMCO Value Investing | A Different Approach  
31 views · 1 month ago

## 2023 RPAG National Conference - Limitless ▶ Play all

The RPAG National Conference is three-day, exclusive event held every September at the stunning



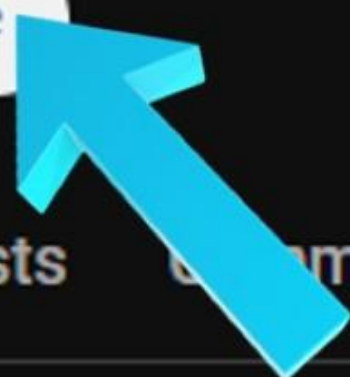
# RPAG

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Community



Videos



Play all



# Different AIs



Grammarly – Spellcheck and grammar checker

Quillbot – Paraphrasing Tool

Microsoft Copilot – Answer AI for search queries

Jasper – Content creation, templates

Character.ai – Creates a personality to talk with

# Summary



Marketing is important for business growth.

Use as an assistant to extend content usage.

Fact Check and edit.



R P  
A G