

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**



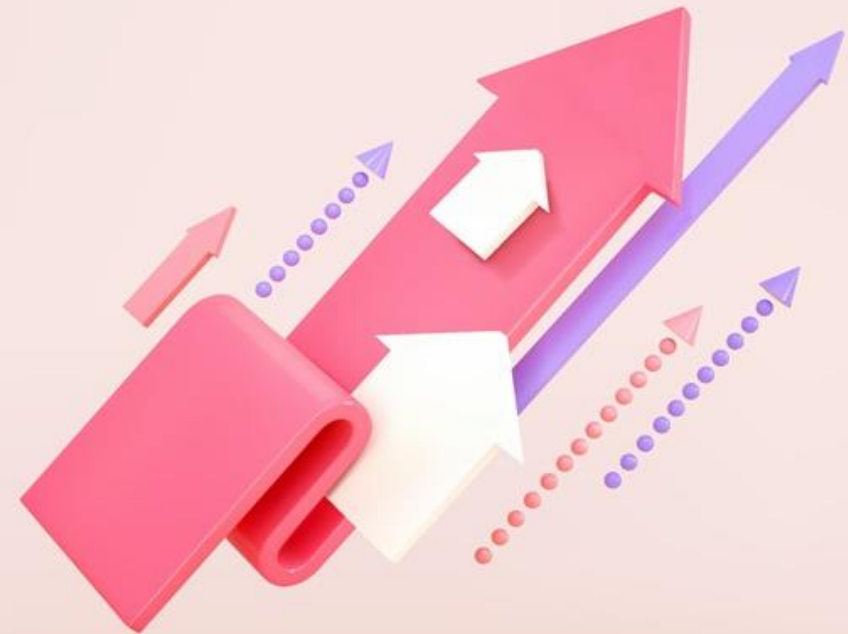
The Significance of Marketing



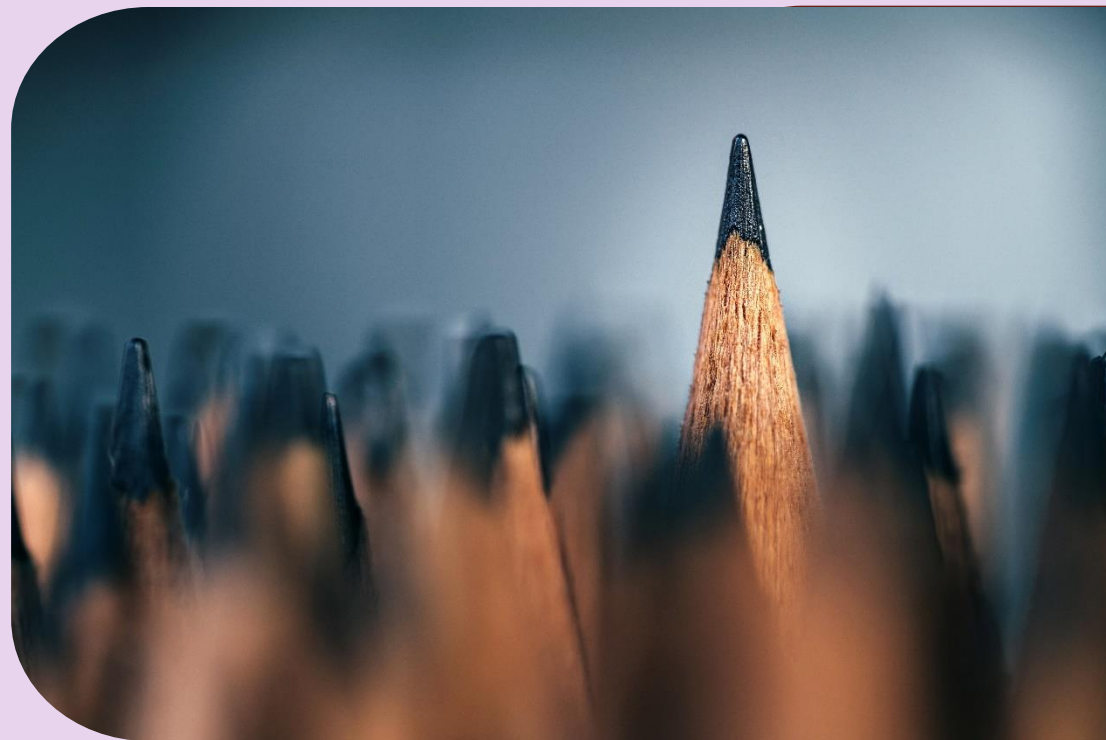
**Establish
Authority**

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.

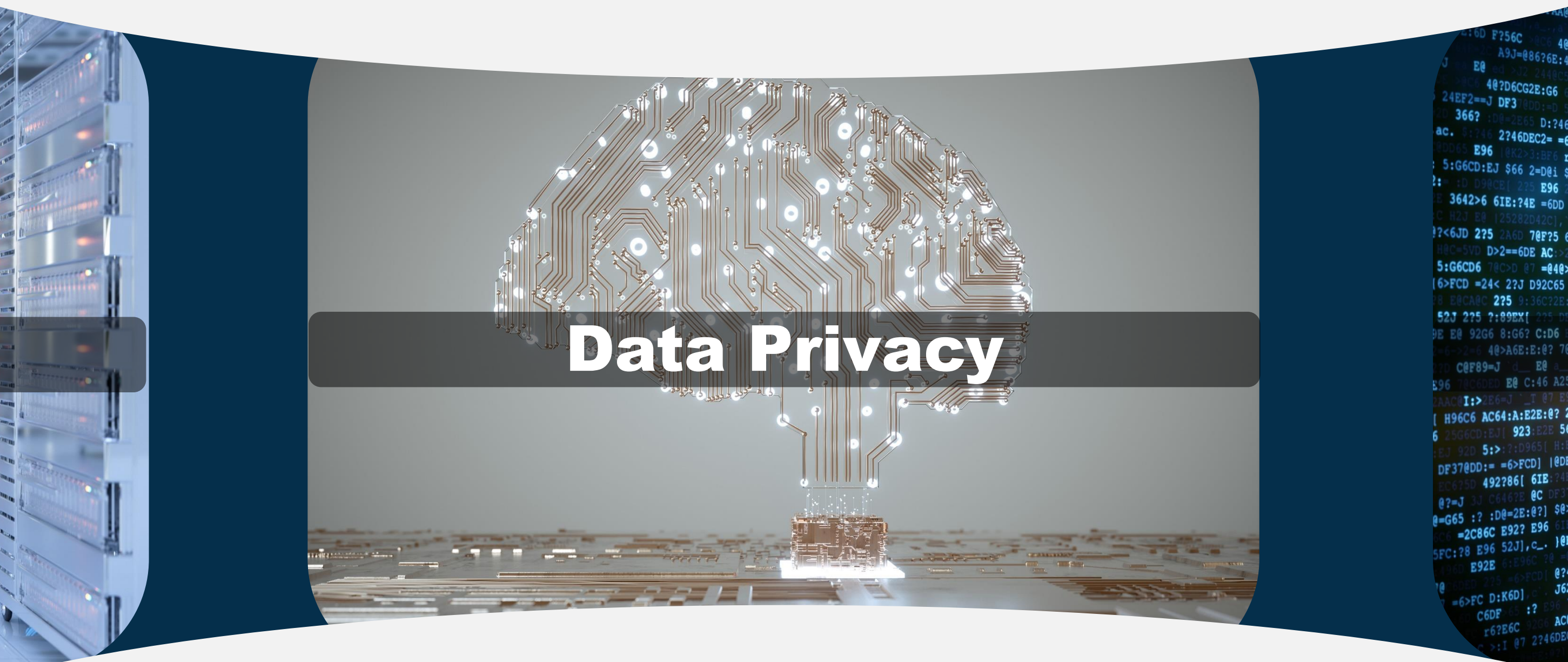
Set cle
AI

ching it
d.

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

B

WARNINGS



Data Privacy

16D F?56C 40C6 40
A9J=@86?6E:
E0 ed >32 244
40?D6CG2E:G6
24EF2==J DF370DD:=D
366? :D0=2E65 D:246
ac. 3:746 2?46DEC2= =6
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38 E0CA0C 275 9:36C?2E:
52J 275 7:09EX| 275 DE
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7D C@F89=J d... E0 a...
E96 70C60ED E0 C:46 A25
IAAC@I:>2E6=J '_I @7 E5
[H96C6 AC64:A:E2E:0? 2
6 25G6CD:EJ| 923:E2E 50
:EJ 92D 5:>?:D965| H:
DF37@DD:= =6>FCD| |@D
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0C6 =2C86C E92? E96 6I
5FC:28 E96 52J),c... |0
700D E92E 6:E96C 70 =
70 @000 225 =6>FCD| @?
=6>FC D:K6D], = J6
C6DF 65 :? E96
r6?E6C 9206 AC
>:I @7 2?46DE

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?



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! 👛 🚀

🎯 Innovative Financial Planning 🎯

🚀 Portal Perks Alert! 🚀

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



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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 button at 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





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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rpag.com/?utm_source=youtube&utm_medium=social and 3 more links

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A Revolution Around the PlanFees Universe
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2023 RPAG National Conference - Limitless ▶ Play all

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



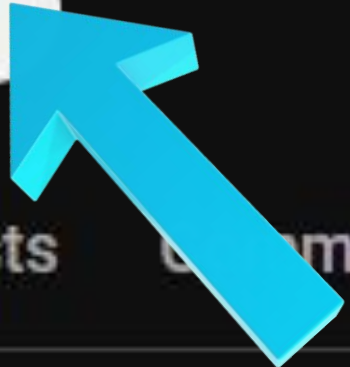
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Community



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.