LeadCenter.AI

AI-Powered Sales and Marketing Automation for Financial Advisors

LeadCenter.AI

AI-powered sales and marketing automation platform to help financial advisors automate sales and marketing processes to increase the conversion rate of leads to business and improve customer satisfaction while reducing operational costs.

LeadCenter.AI | Financial Advisors Sales Automation Platform

600+
companies

200,000+
contacts captured

25+
team members

40,000
contacts converted to appointments

$ 2.5 Billion
in closed Assets Under Management in 2022

$800 Million
In sold annuities in 2022

OakHarvest Financial Group

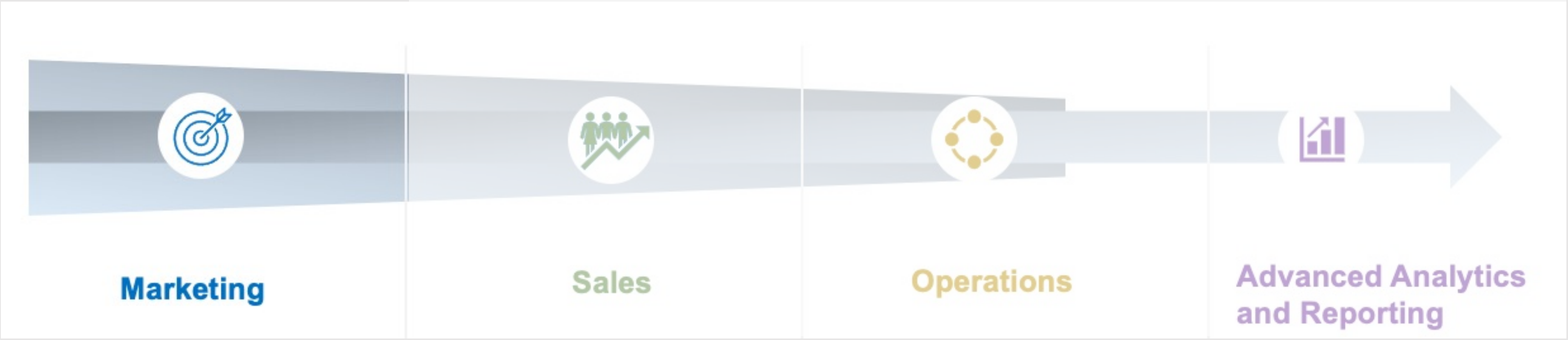
Georgia Advisory Group

CC Coaching & Consulting

Challenges Facing Financial Advisors Marketing

Marketing

- Inability to track and capture contacts from all sources.
- Inability to automatically associate leads with the appropriate marketing channels for precise investment direction.
- Inability to precisely track marketing expenditures across channels and link generated leads to calculate ROI and Customer Acquisition Cost.
- Devoting substantial time to generating marketing reports each month.



Challenges Facing Financial Advisors' Sales

Sales Automation

- Insufficient intelligence about new contacts, leading to challenges in qualification.
- Delayed responses to contacts, resulting in reduced conversions.
- Isolated marketing and sales systems, leading to missed opportunities and wasted time on synchronization.
- Lack of an integrated system for managing opportunities with automated workflows to improve the closure rate.
- Time-consuming process to generate sales reports each month.

Challenges Facing Financial Advisors Operations

Operations Optimization

- Operations spend a significant amount of time tracking advisors' productions and commissions for both the company and the advisor.
- Lack of a unified system to track fees and commissions across various products (AUM, Annuities, Insurance, or financial planning only).

Challenges Facing Financial Advisors Management

Analytics & Reporting

- Lacking a straightforward method to track and monitor day-to-day operations.
- Staff dedicates a significant amount of time each month to report production.
- Absence of a centralized dashboard for monitoring Key Performance Indicators, impeding faster decision-making for the company.

Problem

Low Conversion Rate from Contacts to Paying Customers

Tracking

Not able to track and capture contacts from all sources

Intelligence

Not enough intelligence about each contact

Engagement

Not responding to contacts on time, which reduces conversions

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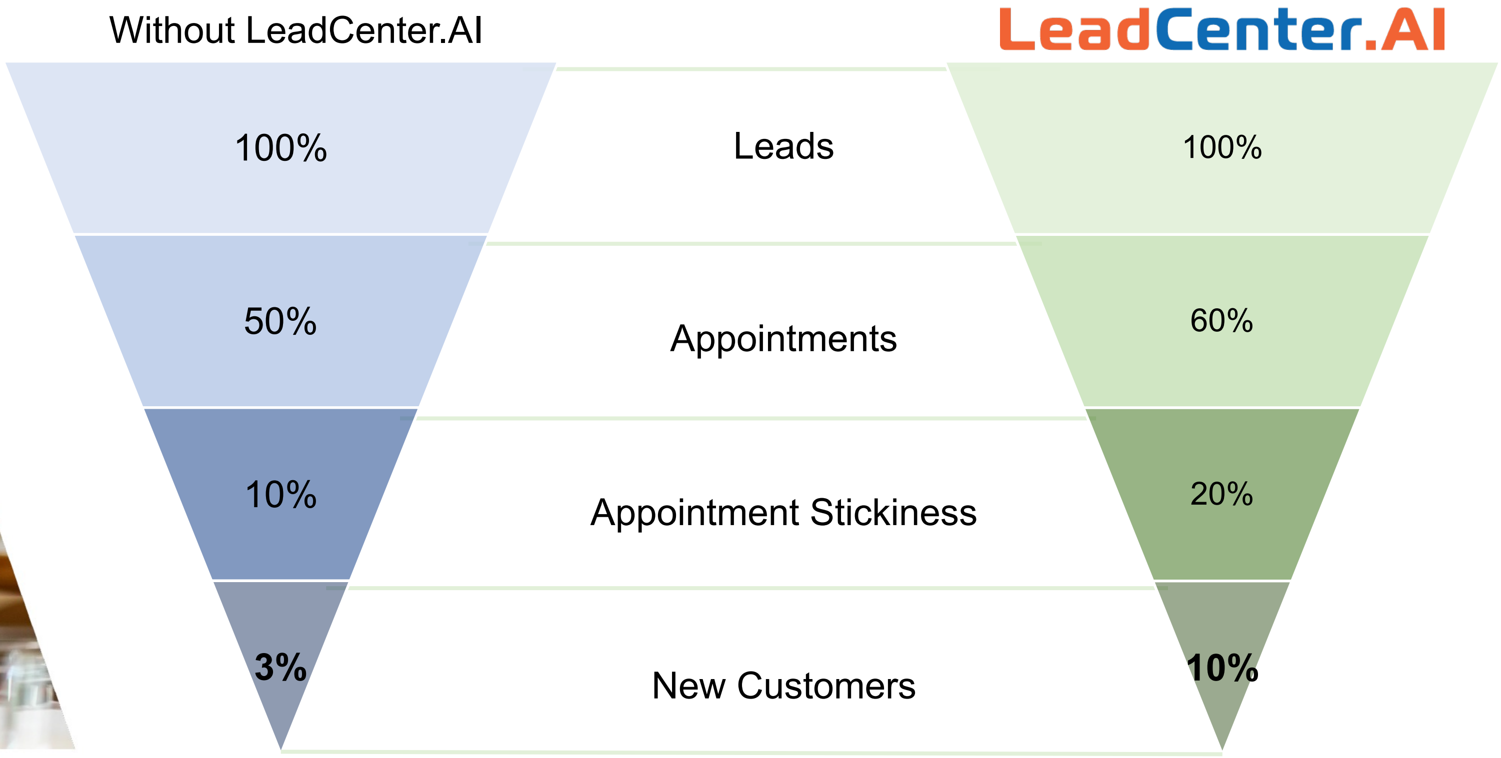
Improve Conversion Rate from Leads to Business

LeadCenter users witnessed an improved conversion of leads to new customers from 3% to more than 10% in 2022

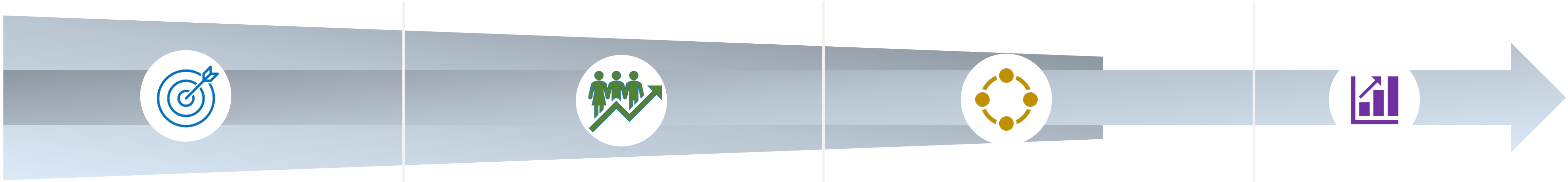
More Engagement

More Appointments

More Revenue



The Operating System for Financial Advisors



Marketing

- Website, landing page, and forms builder.
- Contact capture from all sources.
- Public calendars at bookmytime.ai
- Events Management with automated registration (coming in Q3 2023).

Sales

- Lead and contact management
- Workflow automation.
- Automated lead intelligence.
- Contact engagement with email, SMS, and appointments.

Operations

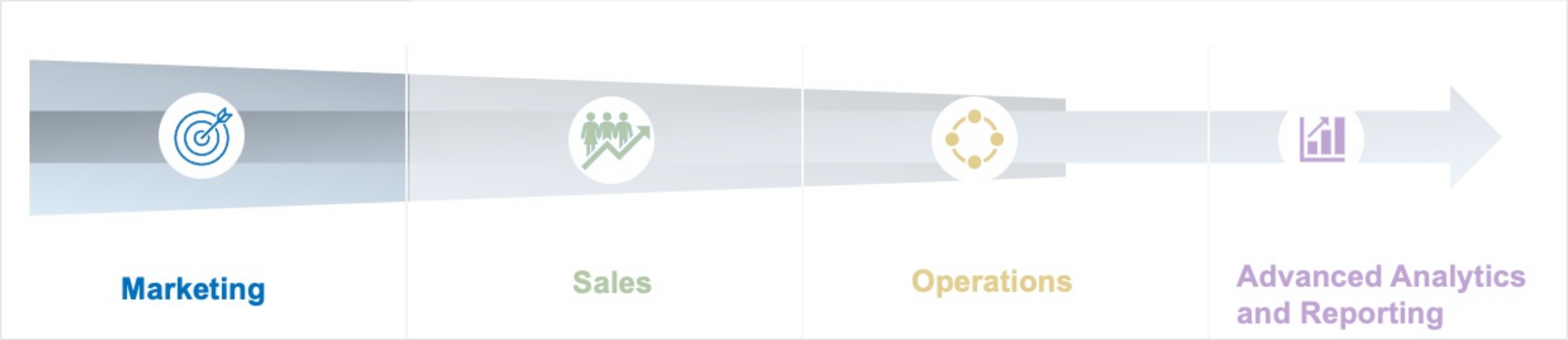
- Production tracking.
- Company revenue tracking for AUM, annuities, and insurance.
- Advisors commission tracking.

Advanced Analytics and Reporting

- Advanced reporting with visualization for production, appointments, and contacts.

The Operating System for Financial Advisors

Marketing Automation



Marketing for Financial Advisors

Marketing

Landing Page Builder

Form Builder

Website Builder

Public Calendar at Bookmytime.ai

Marketing

Complete Marketing Suite to Generate more leads

Lead Capturing & Campaign Tracking

Marketing Reports & Analytics

Virtual Phone Numbers

Zapier Integration

Event Management with automated Registration (Q3 2023)

Mass Email Marketing (Q4 2023)

Contact Capturing & Tracking

Marketing

WEBSITE FORMS
Capture form submissions

ZAPIER
Push leads through Zapier API

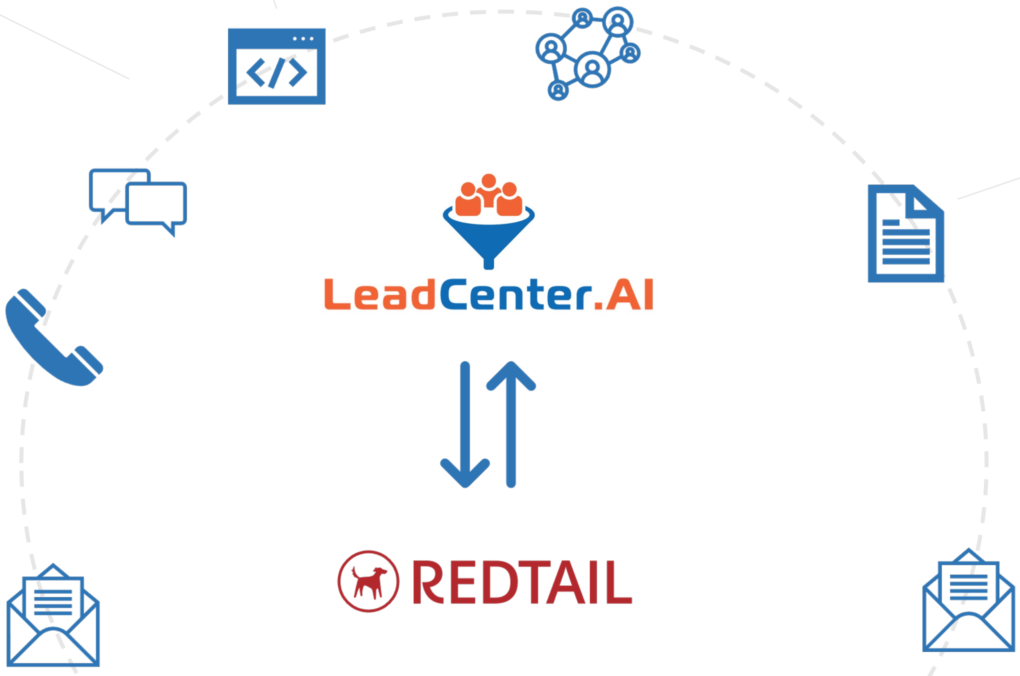
CHATS
Capture chats on website

CSV UPLOAD
Upload leads via Excel\CSV

PHONE CALLS
Virtual phone numbers for channels

EMAIL
Forward leads by email

Marketplaces
Captures leads from marketplaces



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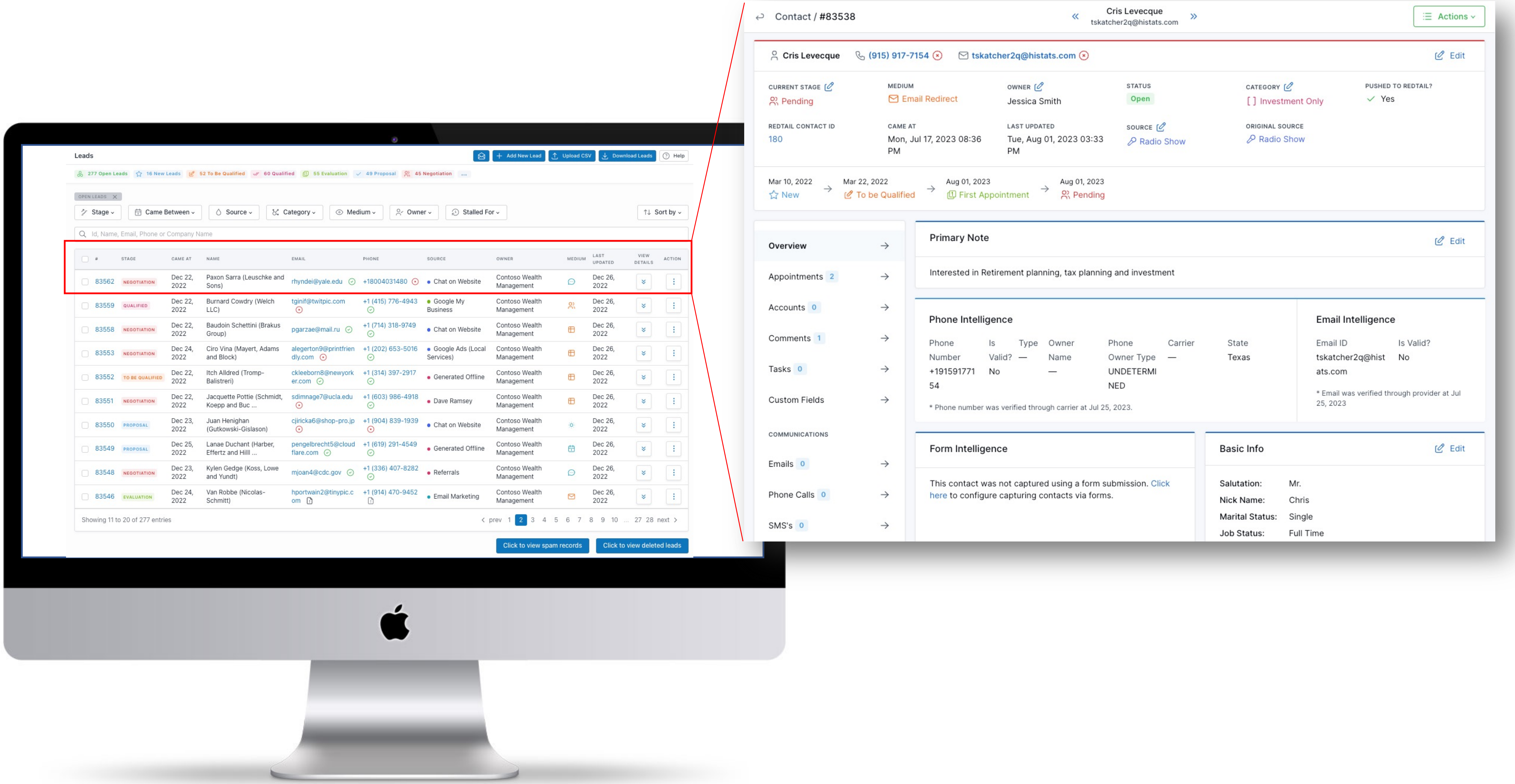
Marketing

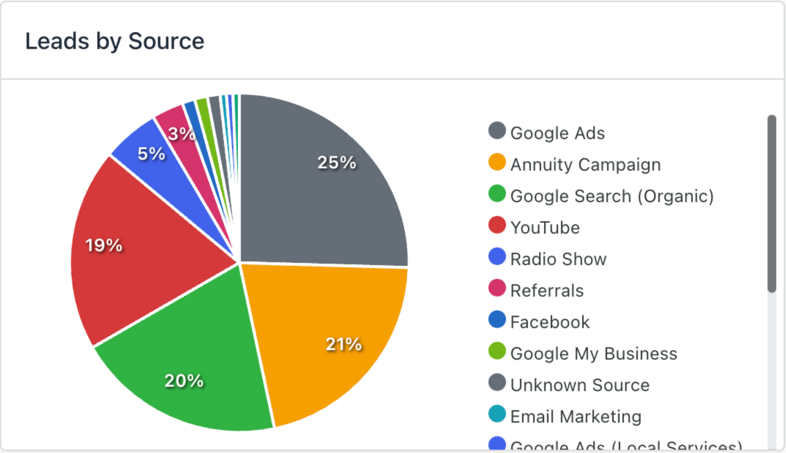
Contact Capturing Screen Example



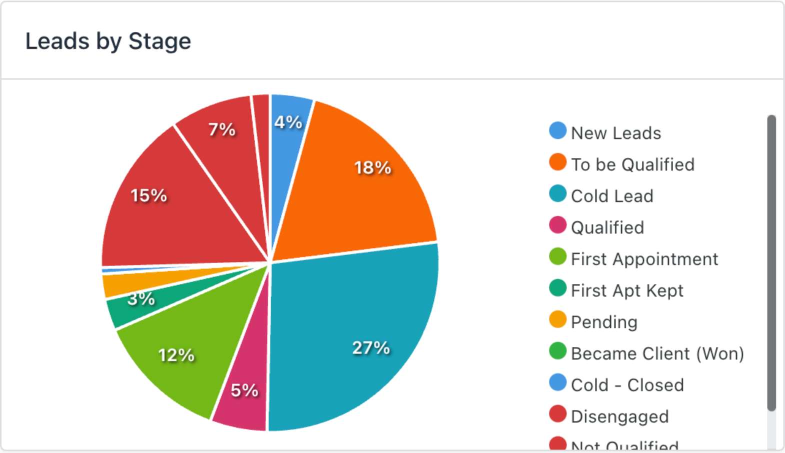
Contact Tracking

Marketing

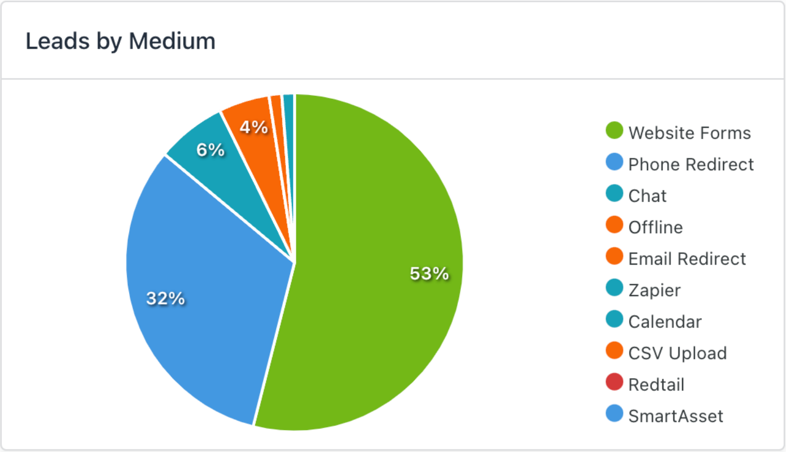
Track Contact by Source, Stage, and Medium to know where to strategically allocate your marketing resources.



Sources

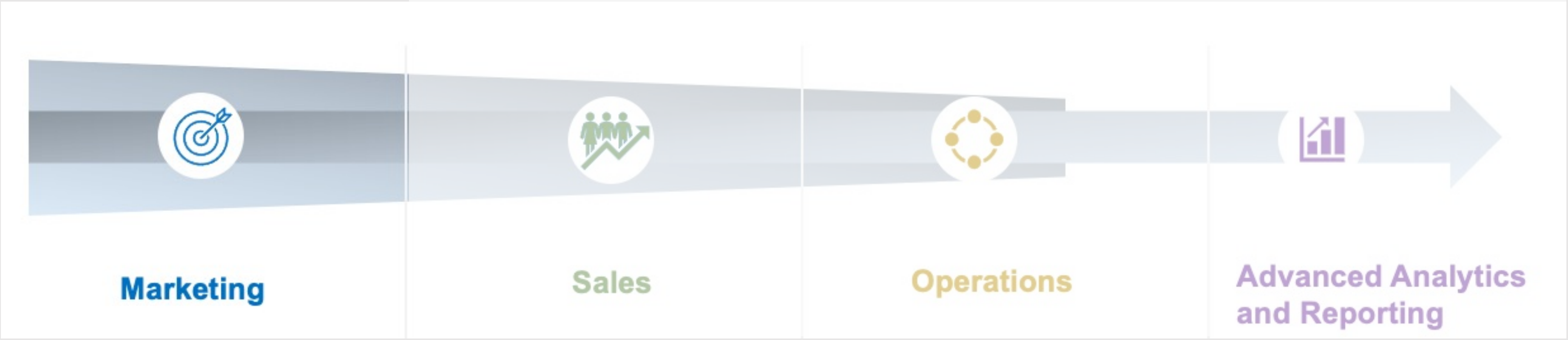


Stages

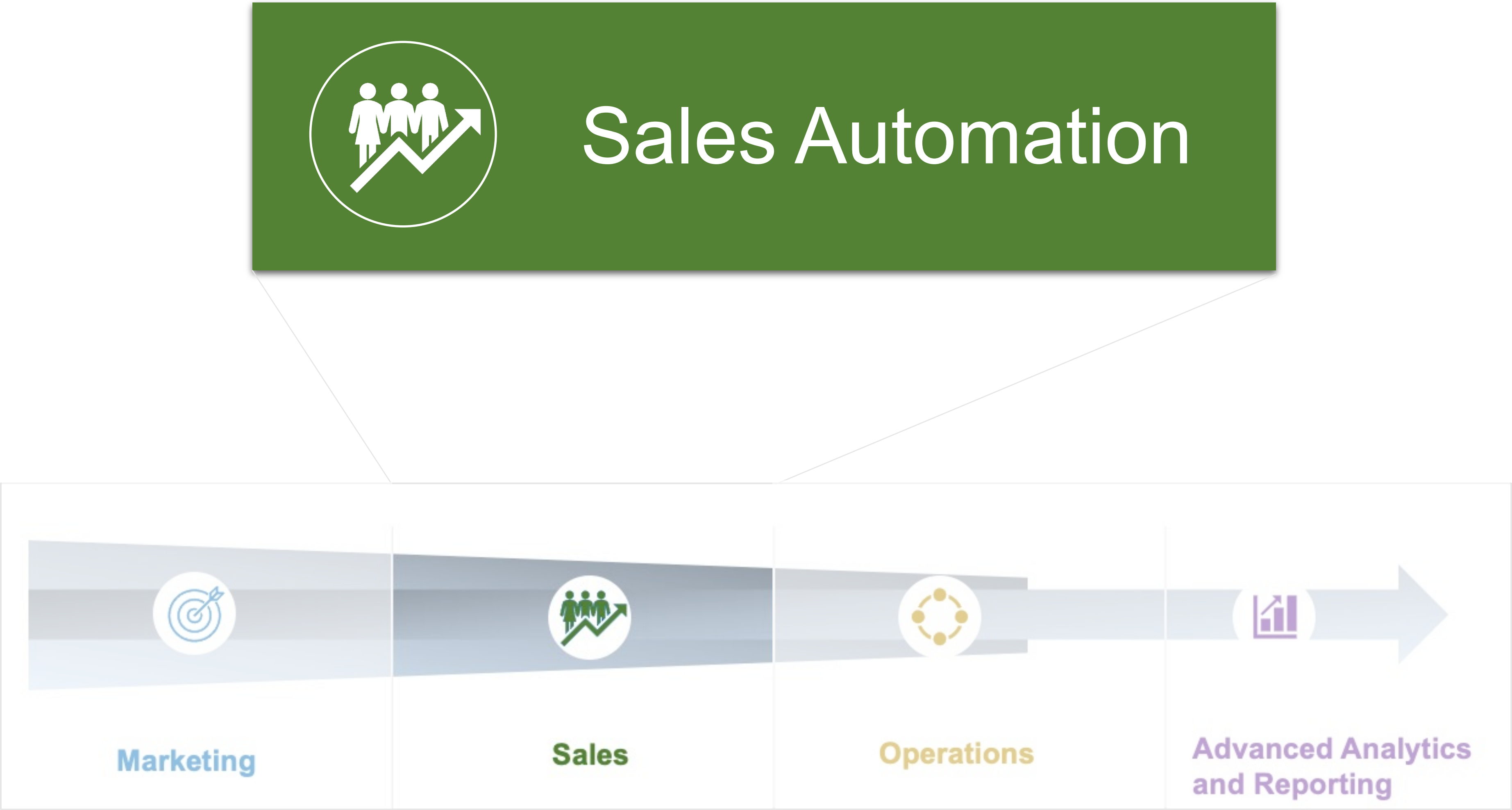


Medium

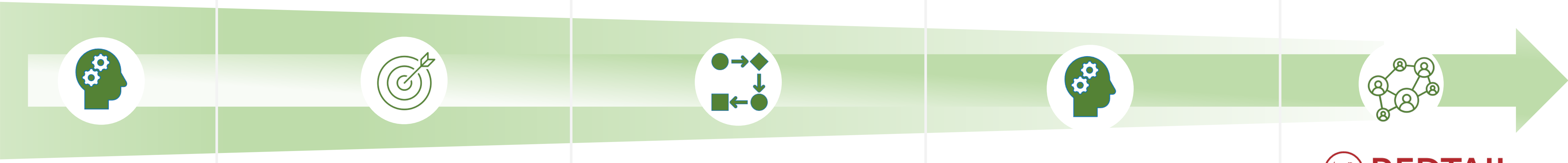
Marketing Demo



The Operating System for Financial Advisors



Sales Automation



REDTAIL

Contact Intelligence	Sales Engagement	Workflow Automation	Appointments	Integration
Automate verifying contacts and gathering lead intelligence.	Manage leads and opportunities in stages using the lead dashboards.	Create workflows using email and SMS templates to engage the lead.	Manage appointments with your contacts using a full calendar and appointment management system.	Sync contacts, appointments, and accounts with your CRM.

Contact Intelligence

More than 19 data intelligence points are gathered about each contact

Phone

Owner name
Owner type
Phone type
Carrier name
State
Last date verified

Email

Email verification
Email open
Email clicks
Last date verified

Interactions

Call recording
Call transcription
Email history
SMS history
Appointment history
Previous leads

Source

Source
Medium
Campaign
Campaign terms
Form name

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Sales Automation

Contact Intelligence Screen Example

Phone lookup information

Lead Intelligence

Phone Intelligence

Phone Number	Is Valid?	Type	Owner Name	Phone Owner Type	Carrier	State
(281) 908-7076	Yes	mobile	Steve Ramadan	Consumer	Verizon Wireless	Texas

* Phone number was verified through carrier at Dec 20, 2022.

Email Intelligence

Email ID	Is Valid?
steve@leadcenter.ai	Yes

* Email was verified through provider at Dec 20, 2022

Form Details

Form
Request a Consultation Form

Url
https://samplefinancialadviserwebsite.com/appointment

Campaign Source	Campaign Medium	Campaign Name
Google Ad	Form	financial_advisor_near_me

Campaign Term	Campaign Content
Financial advisor near me	—

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Sales Automation

Contact Intelligence Screen Example 2

Automated call recording and transcriptions

Phone Call Intelligence

LEAD ID	CALL STATUS	CAME AT	CALL DURATION	PLAY RECORDING	CALL CONFIDENCE	CALL TRANSCRIPTION
119279 *	Accepted	Tue, Dec 06, 2022 02:30 PM (Central Time - US & Canada)	3 minutes 51 seconds		79.90%	
116473	Accepted	Tue, Oct 18, 2022 09:43 AM (Central Time - US & Canada)	1 minutes 44 seconds		80.72%	

Call Transcription (Confidence: 80.72%)

Agent

Yeah. Actually I answered your call but in a different call but is there. This is regarding what

oh,

Customer

Yes, so we spoke last week. I am working with a different financial advisor. But I am looking for some one with a better experience to help me with estate planning.

Agent

Ok, let me ask you few questions first so I can schedule a consultation with one of our advisors

What are your current investable assets without real estate?

Customer

Around thirty million dollars

Agent

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Sales Automation

Contact Intelligence Screen Example 4

Email open and clicks

TOTAL SENDS	TOTAL RECEIVED	OPEN RATE	CTR
977	8218	442 (45%)	147 (15%)

LEAD ID	LEAD STAGE	SUBJECT	FROM	TO	DATE	ATTACHMENT	OPENS	CLICKS	ACTION
85169	WON	Still working on the plan		m	Thu, Jan 27, 2022 09:02 AM	—	145	0	Reply
85169	WON	Jay: following up on our last coversation		m	Sat, Feb 05, 2022 12:06 PM	—	138	0	Reply
112794	WON	Water Restoration Website			Wed, Aug 24, 2022 07:11 AM	—	55	1	Reply
91951	NEW	Re: followup			Fri, Feb 11, 2022 06:47 AM	—	44	1	Reply
99593	LOST	Thank you for contacting us.			Fri, Apr 01, 2022 06:20 PM	—	41	0	Reply

Contact Engagement

Improve conversion by improving contact engagements with tasks, appointments, email, SMS, and reminders

Appointments

Send meetings linked to leads

Email

Send emails and track open and click rates

SMS

Send and receive SMSs and track delivery

Tasks

Create tasks for leads

Automated Workflows

Automate contact actions

Reminders

Automate sending appointment reminders to customers

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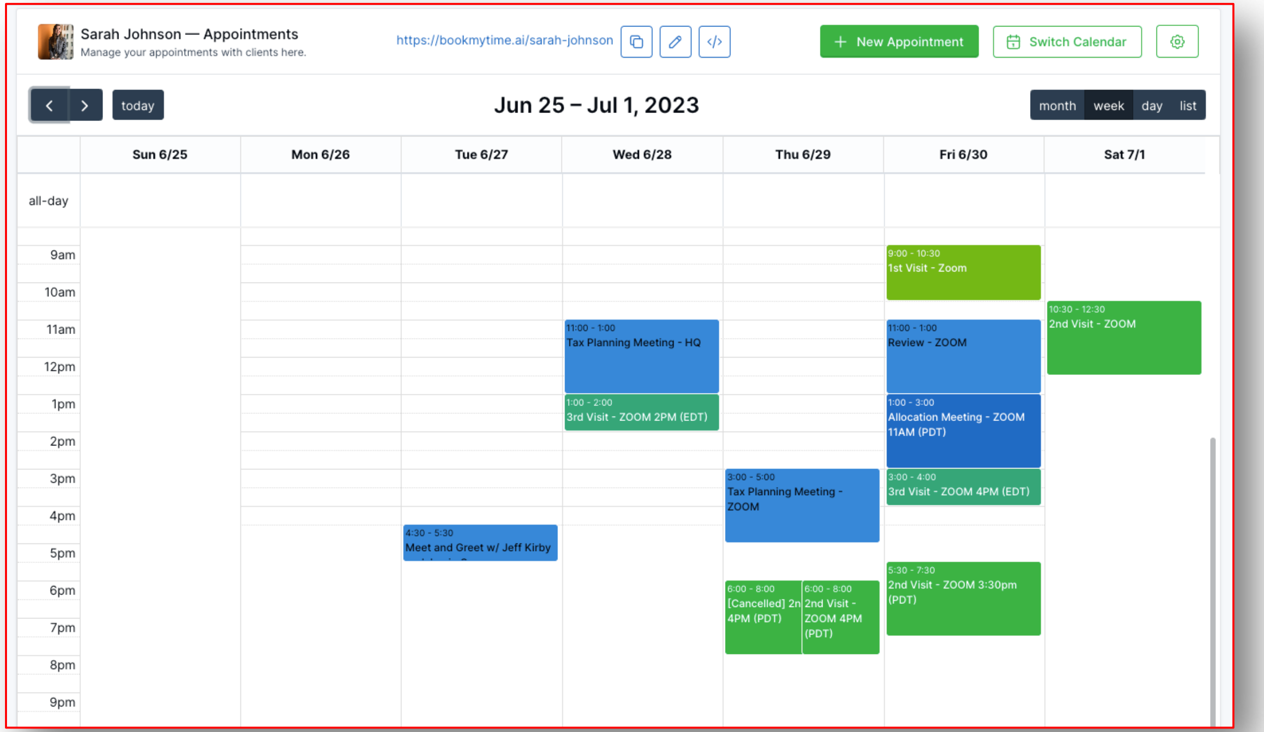
Calendars

BookmyTime.AI by LeadCenter.AI

Sales Automation

- Bookytime.AI/<yourname> public calendar
- Share with clients or prospects to check your availability and book meetings directly with you.
- Reduce friction in the sales funnel and close more deals.
- Keep deal momentum high by removing scheduling friction at every stage of the sales cycle.



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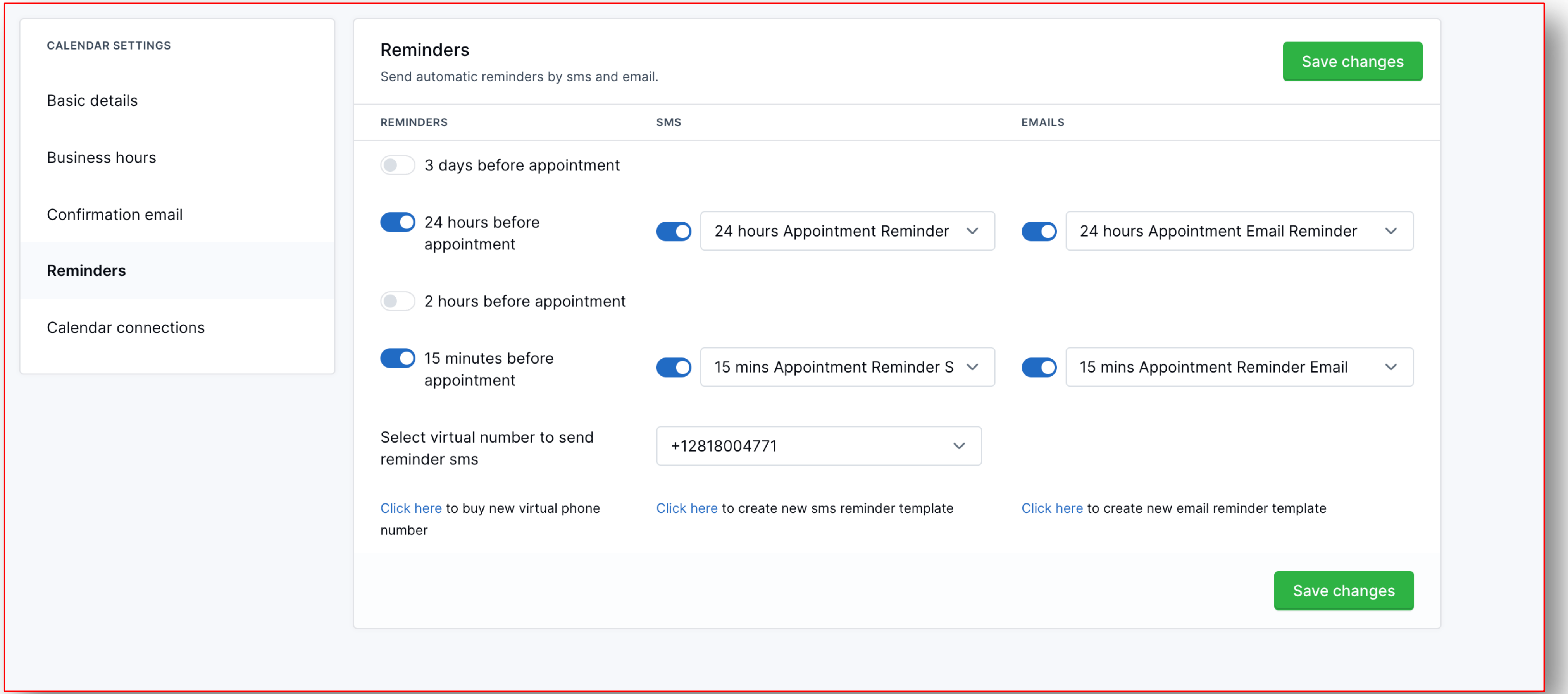
Calendars

BookmyTime.AI
by LeadCenter.AI

Sales Automation

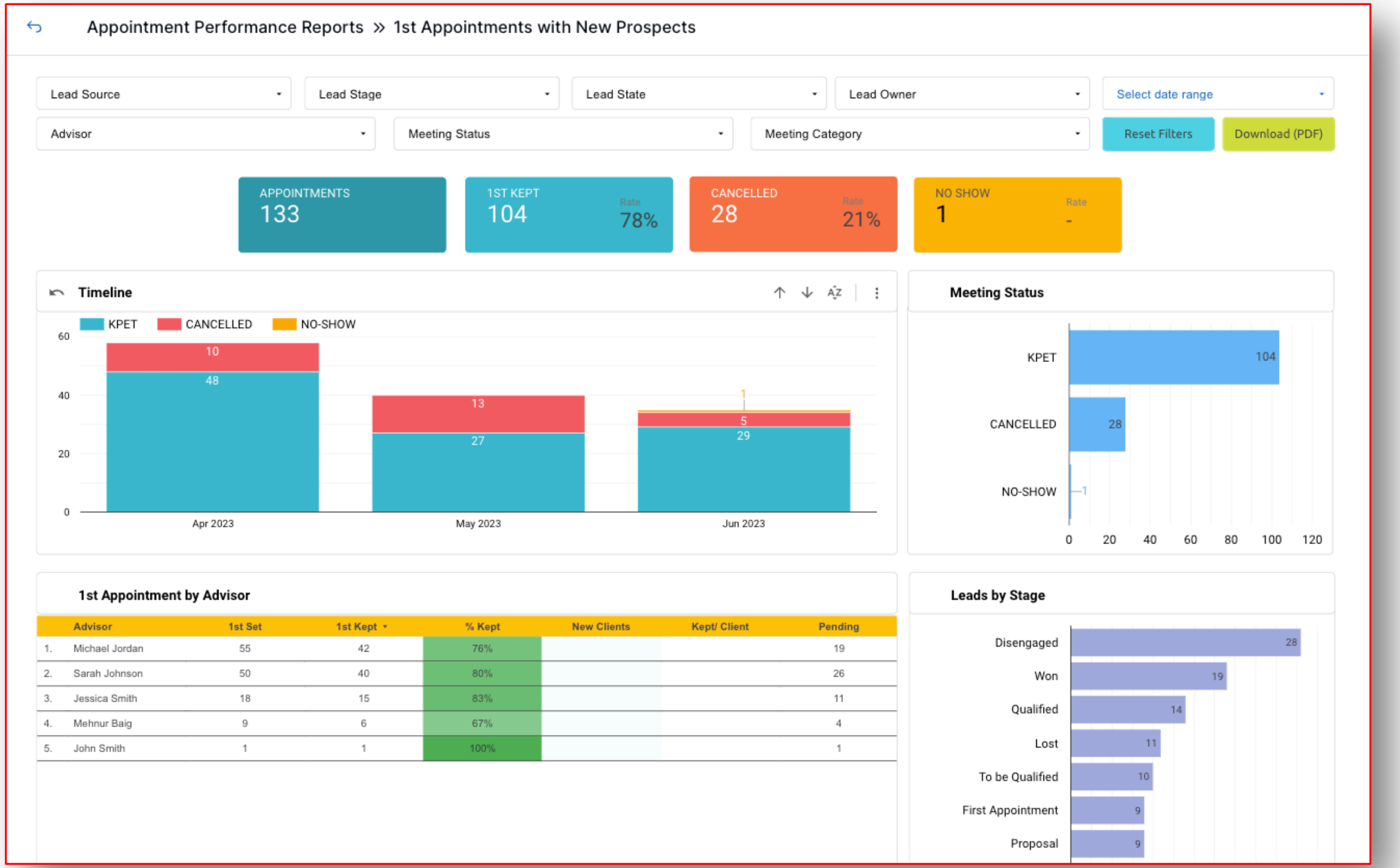
- Automated confirmation and reminders by email and SMS
- Custom templates for email and SMS reminders



Sales Automation

Calendars

- ➢ Reporting and visualization on appointments to track the health of engagement with clients
  - ✓ 1st Appointment Conversion
  - ✓ Redtail Appointments Reports
  - ✓ Deals Velocity Reports
  - ✓ Custom Reports



Sales Automation

Sales Automation Demo

The Operating System for Financial Advisors

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Production Tracking

Operations Optimization

- Tracking of accounts and productions by custodian, carriers, business type, advisors, status, and more.
- Tracking AUM, Annuities, Insurance, and Financial Planning products while still in the sales process.
- Easy uploading of annuities and insurance pricing and commission rates for accurate tracking of company revenue.
- Advanced Reporting and Visualization.

Accounts

Help

Writing Advisors | Account Status | Account Type

Contact ID, Contact Name, Email, Phone, Contract Number or Company Name

CONTACT ID	ACCOUNT ID	NAME	CONTRACT NUMBER	ADVISOR NAME	APP SIGNED DATE	AMOUNT	TYPE	STATUS	VIEW DETAILS	ACTION
83523	674	John Doe	123456789	John Smith	Jul 21, 2022	$500,000	AUM	Pending		
83332	675	Jane Smith	987654321	Sarah Johnson	Jul 22, 2023	$200,000	AUM	Issued		
83507	676	Mike Johnson	AN123456	John Smith	Jul 08, 2023	$150,000	Insurance	Issued		
83456	677	Sarah Davis	AN987654	Sarah Johnson	Jul 06, 2022	$250,000	Insurance	Pending		
83481	678	Emily Wilson	890123456	John Smith	—	$5,000	Financial planning only	Issued		
83198	679	Jessica Thompson	456789012	Sarah Johnson	—	$1,000	Financial planning only	Cancelled		
83525	712	Candra Wiggans	13454	John Smith	Jul 15, 2023	$532,000	AUM	Issued		
83560	715	Rudie Valenti	246813579	Jessica Smith	Jul 25, 2023	$750,000	AUM	Issued		

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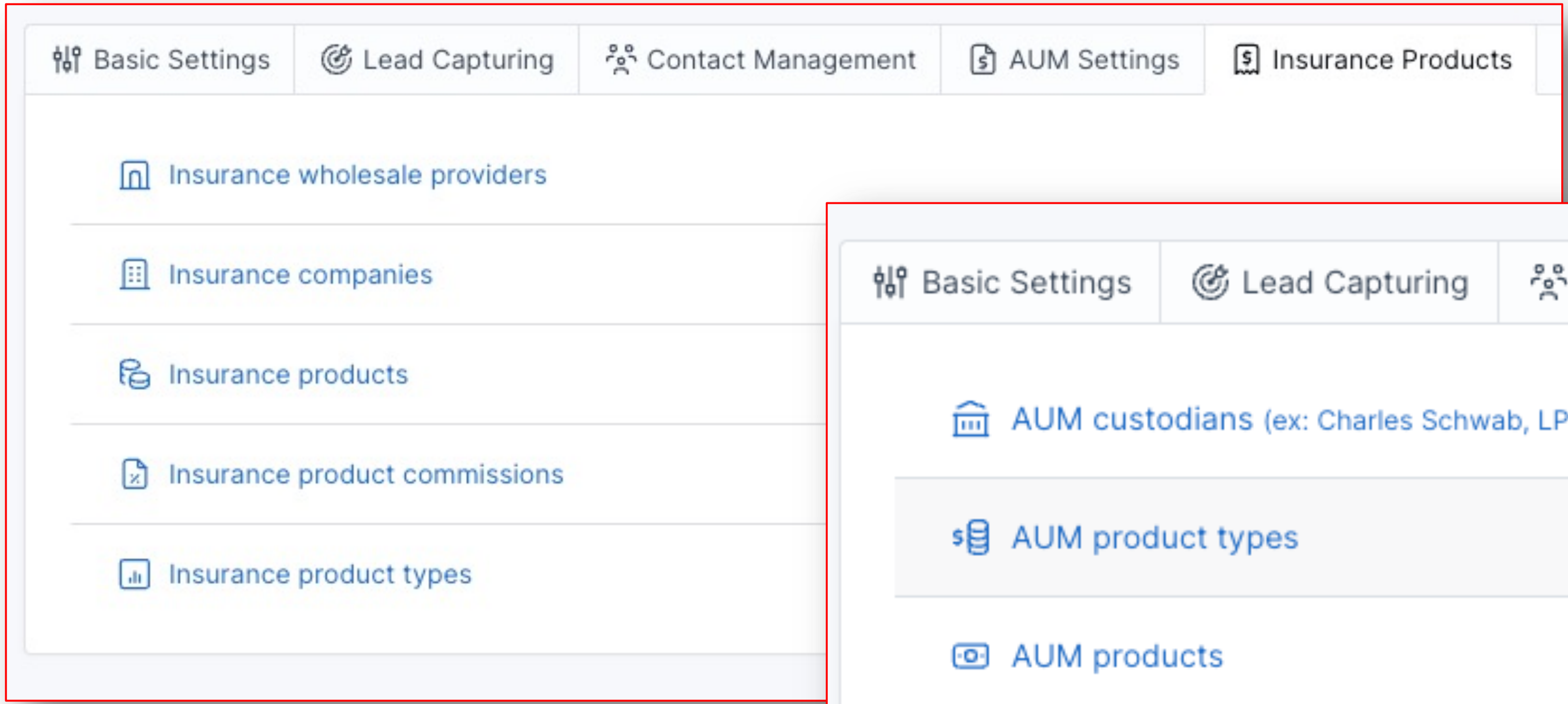
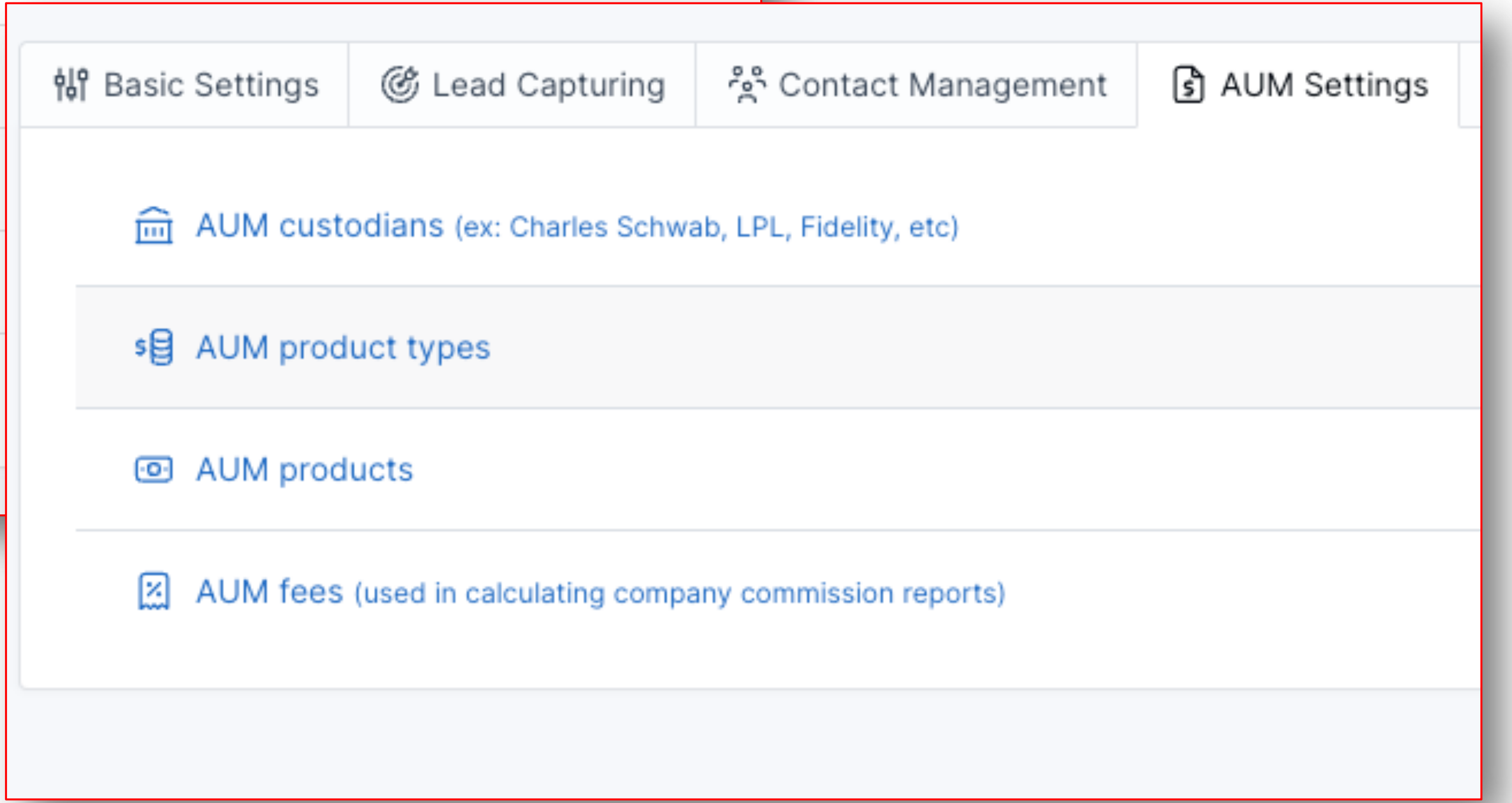
Operations Optimization

Production Tracking

Customizable account settings for both AUM and Insurance.





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Company Commission Tracking

Operations Optimization

Track company fees and commission across annuities, insurance, and AUM products.

AUM Fees

The annual fees you charge for assets under management. This value will be used to calculate revenue from AUM accounts

Add New Fee

Help

#	START RANGE	END RANGE	FEE	BASIS POINTS	
1	—	$999,999	1.37%	137	Edit Delete
2	$1,000,000	$1,499,999	1.22%	122	
3	$1,500,000	$1,999,999	1.2%	120	
4	$2,000,000	$2,999,999	1.07%	107	
5	$3,000,000	$3,999,999	0.97%	97	
6	$4,000,000	$4,999,999	0.89%	89	
7	$5,000,000	$9,999,999	0.81%	81	
8	$10,000,000	$24,999,999	0.75%	75	
9	$25,000,000	—	0.62%	62	

Insurance Product Commissions

Add new Insurance Product Commission

Wholesale Providers → Insurance Companies (Carriers) → Insurance Products → Product Commissions

Insurance Company

#	COMPANY (CARRIER)	PRODUCT	AGE RANGE START	AGE RANGE END	STREET LEVEL COMMISSION	
46	Ameritas	FlexMark Select	76	85	5%	Edit Delete
47	Ameritas	FlexMark Select LT	—	75	7%	Edit Delete
48	Ameritas	FlexMark Select LT	76	85	5%	Edit Delete
49	Ameritas	FlexMark Select LT Plus	76	85	4%	Edit Delete
50	Ameritas	FlexMark Select LT Plus	—	75	6%	Edit Delete
51	Ameritas	FlexMark Select Plus	76	85	4%	Edit Delete
52	Ameritas	FlexMark Select Plus	—	75	6%	Edit Delete
53	Aspida	Synergy Choice (3 yr.)	18	80	1.5%	Edit Delete
54	Aspida	Synergy Choice (3 yr.)	81	90	0.75%	Edit Delete

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Operations Optimization

Advisors Commission Tracking

Create advisors commission plans to track advisor commissions. Multiple plans can be created for different advisors with different commission ranges based on attainment.

Advisor Commission Plan Ranges

How much commission each advisor will make based on total production range.

Add New Commission Plan Range | Help

Production Advisors Commission Plan - 2023

#	START RANGE	END RANGE	COMPENSATION RATE	
1	—	$39,999,999	22%	Edit Delete
2	$40,000,000	$49,999,999	25%	Edit Delete
3	$50,000,000	$59,999,999	30%	Edit Delete
4	$60,000,000	$69,999,999	33%	Edit Delete
			36%	Edit Delete
			40%	Edit Delete

Employees Commission Plans

Commission that will be paid to employees. You can create multiple plans here, add commission ranges, and add employees.

Add New Commission Plan | Help

#	NAME	START DATE	BASE COMMISSION	TOTAL EMPLOYEE	
1	Senior Advisors Commission Plan	01/01/2023	25.00%	2	Edit Delete Edit Ranges Edit Employees
2	Production Advisors Commission Plan	01/01/2023	22.00%	4	Edit Delete Edit Ranges Edit Employees
3	Planning Advisors Commission Plan	01/01/2023	5.00%	4	Edit Delete Edit Ranges Edit Employees
4	Financial Planning Only	01/01/2023	30.00%	0	Edit Delete Edit Ranges Edit Employees

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Advisor Commission Payments

Operations Optimization

Track payments received in company's bank for specific accounts and link commission payment to advisors based on that.

CONTACT ID	ACCOUNT ID	NAME	CONTRACT NUMBER	ADVISOR NAME	APP
83523	674	John Doe	123456789	John Smith	Jul

Account Issued Date	AUM Custodian	AUM Product
Jun 03, 2022	Fidelity	Growth Portfolio
Spouse Name	**Is Tax Qualified**	**Account Tax Type**
—	✓	401(k)
Source	**Lead Stage**	**Lead Arrival Date**
Google Search (Organic)	Won	Jul 15, 2023

REVENUE & COMMISSION

Company Commission	Company Commission Amount	Received in Bank Date	Received in Bank Amount
1.37%	$6,850	Jun 03, 2023	$1,370
Advisor Base Commission	**Advisor Base Commission Amt (Estimated)**		
22%	$1,507		

Advisor Commission Payments

Help

Writing Advisor | Payment Year | Payment Month

#	CONTACT	ACCOUNT ID	ADVISOR NAME	PAYMENT AMOUNT	PAYMENT DATE	NOTES	
1	#83526 (Nappie Luisetti)	718	Michael Jordan	$14,630	Aug 02, 2023	—	Edit Delete
2	#83508 (Hollis Fenna)	721	John Smith	$1,808.40	Aug 02, 2023	—	Edit Delete
3	#83332 (Jane Smith)	675	Sarah Johnson	$602.80	Jul 27, 2023	—	Edit Delete
4	#83532 (Fayth Bertson)	717	Jessica Smith	$17,160	Jul 27, 2023	—	Edit Delete
5	#83560 (Rudie Valenti)	724	Jessica Smith	$5,335	Jul 27, 2023	—	Edit Delete
6	#83525 (Sandra Wiggans)	713	John Smith	$1,603.45	Jul 05, 2023		Edit Delete

Operations Optimization Demo

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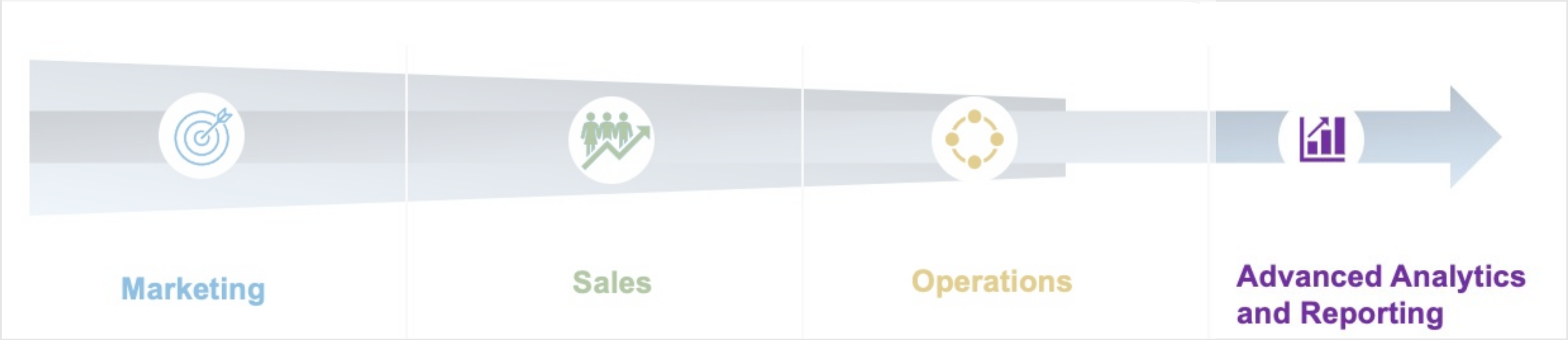
The Operating System for Financial Advisors

Analytics & Reporting



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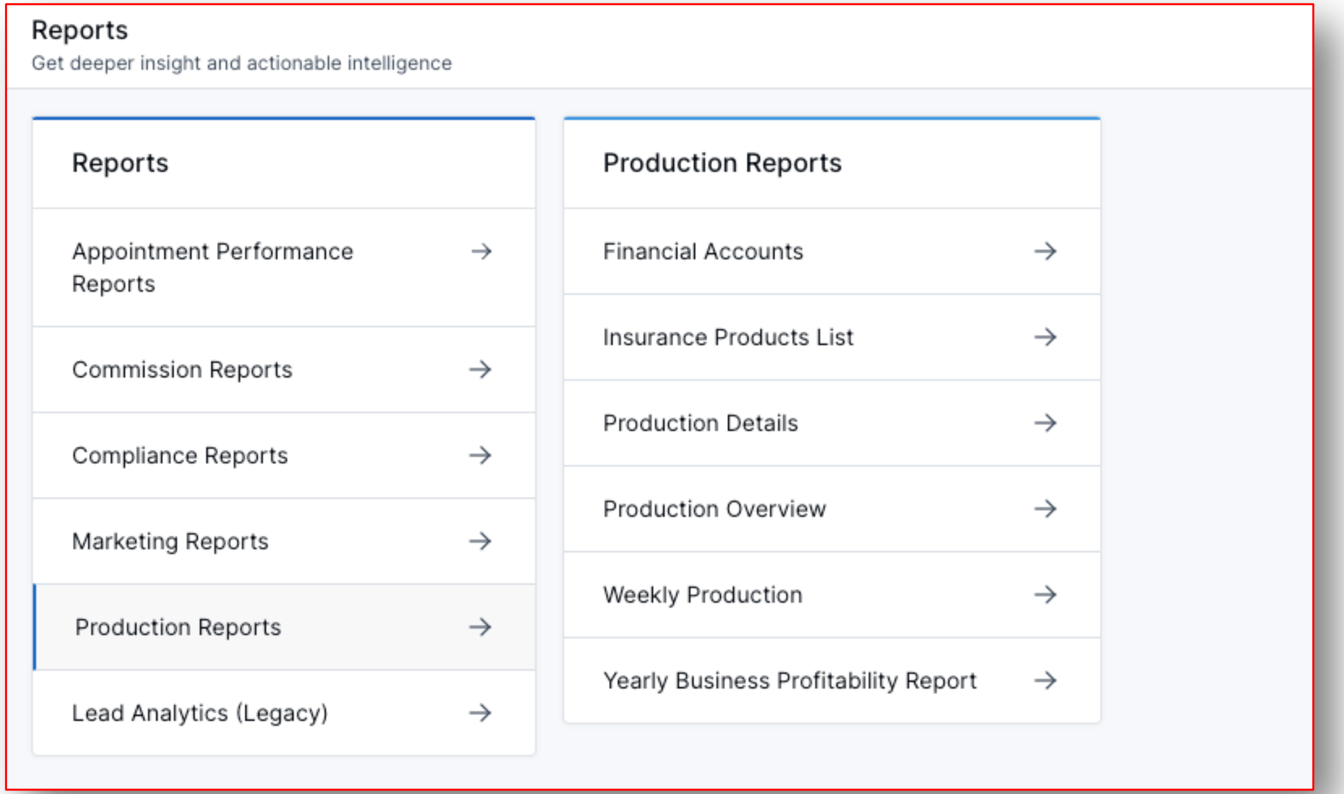
Advanced Reporting and Visualization

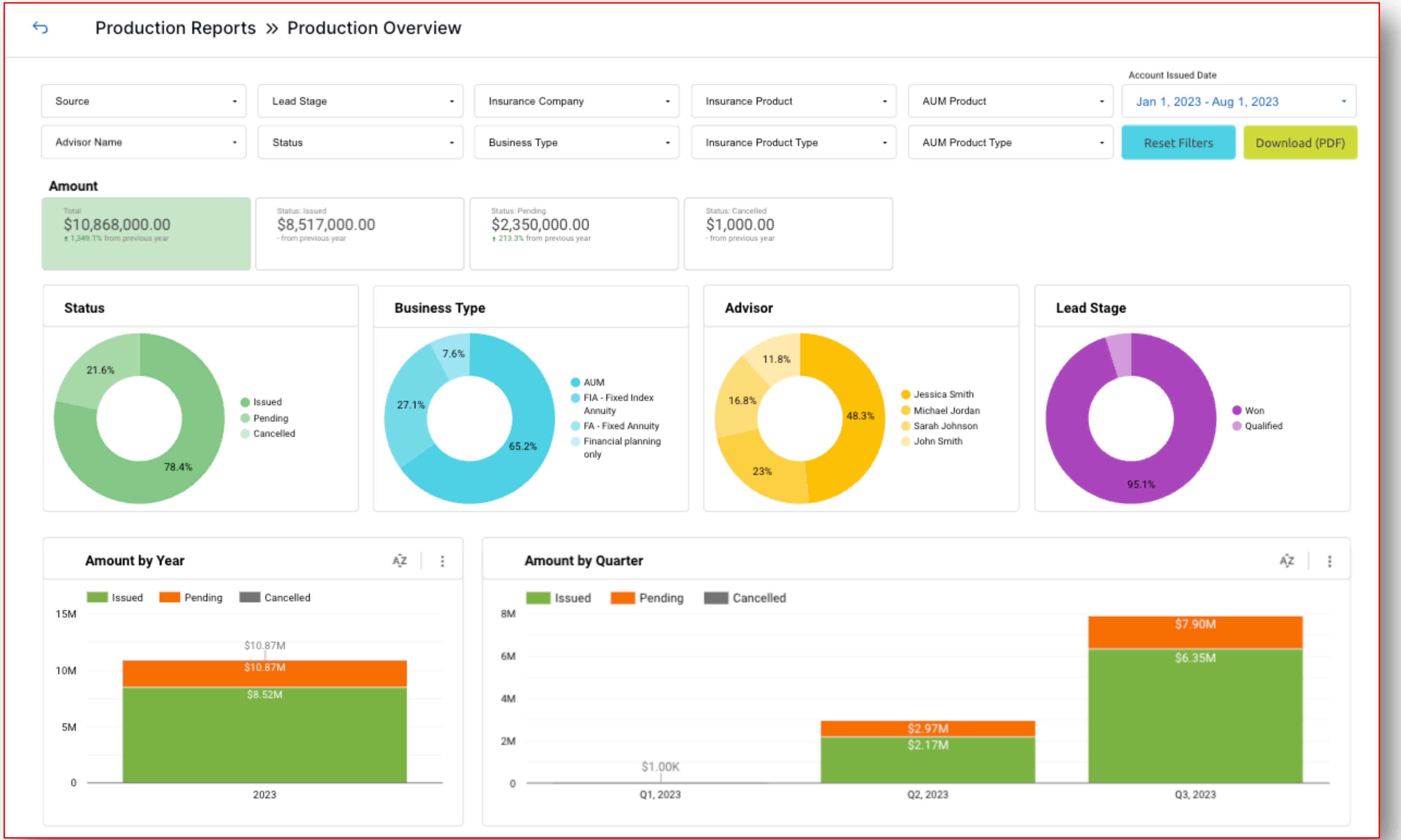
Analytics & Reporting

- Get deeper insight and actionable intelligence on all aspects of your practice.
- Automated Reports include:
  - Production
  - Commission
  - Advisor Performance
  - Compliance
  - Appointments
  - Leads
- Additional custom reports can be added based on your request.



Sample Production Report

Analytics & Reporting



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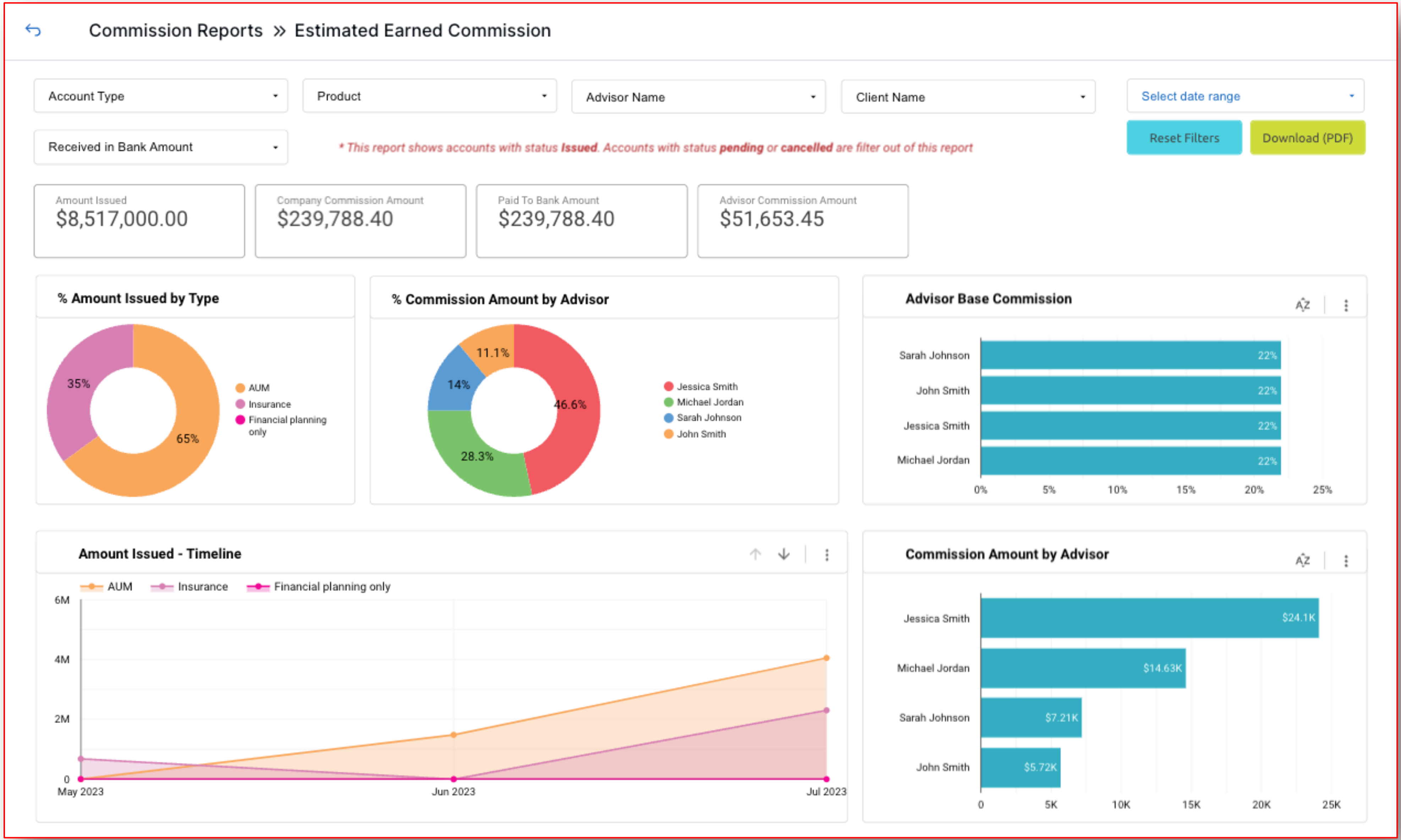
Sample Commission (fees) Report

Analytics & Reporting



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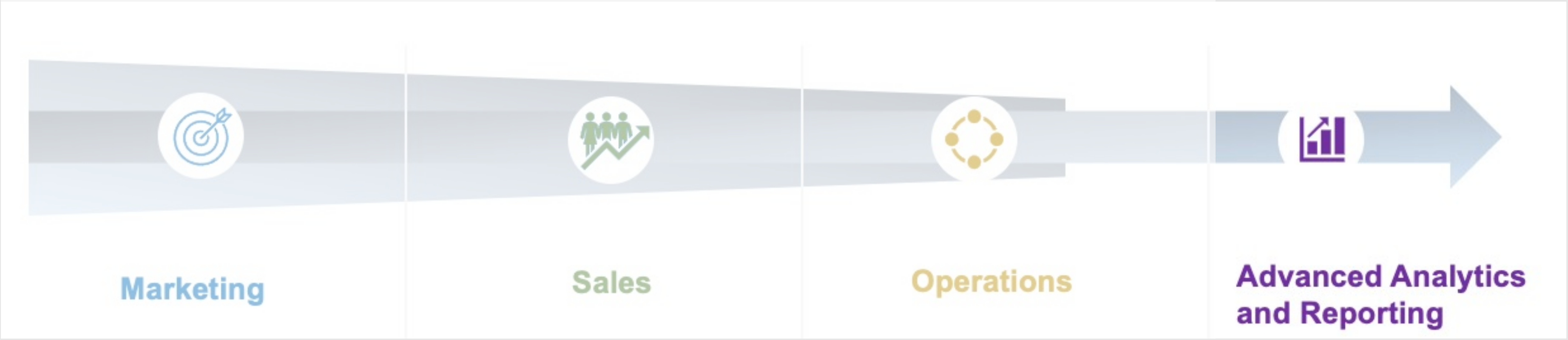
Analytics & Reporting

REPORTS DEMO



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Integrations

zapier

Zapier

Sync based on lead creation and update

REDTAIL

Redtail CRM

Sync contacts, account, appointments, and notes

Google

Sync Email and Calendar

Outlook

Microsoft

Sync Email and Calendar

twilio

Phone & SMS services

Virtual phone numbers

Google Transcription API

Transcribe Inbound Phone call

smartasset™

Financial Advisor Marketplace

Sync based on email forward parser

ORION

Orion

Coming in Q1 2024

Google Data Studio

Reporting, Analytics, and Visualization

Redtail Integration

REDTAIL

Contacts

1. Automated lead capture and contact sync with Redtail without manual entry.
2. Smart contacts push (Lookup contact in Redtail before pushing).
3. Mapping of standard and custom fields to Redtail system fields and user-defined fields.

Appointments

1. Two-way appointment sync.
2. Email and SMS appointment reminders.
3. Mapping of activities to Redtail activity types.
4. Public calendars for customers to book appointments in Redtail.
5. Unified view of Outlook, Gmail, and Redtail calendars in LeadCenter.

Lead Intelligence

1. Redtail contact notes enriched with call transcriptions.
2. Redtail contact notes enriched with lead source, medium, form information, and form URL.

Account Sync

1. AUM, Insurance, and Annuities Accounts synchronization with Redtail.
2. Contact financial info pushed to Redtail.

LeadCenter Support

- Full-service consulting support to assist with onboarding, integration, training, and data migration.
- Custom report development.
- Unlimited email support.
- Unlimited phone support.

Pricing

Lead Center License	Monthly
Per User License	$50

Add-Ons	Monthly
Local phone number	$5
Toll-free phone number	$10
Website builder and hosting	$25

Add-On per Usage

Call recording	$0.0075 per minute
Phone call transcriptions	$0.14 per minute
Email verification	$0.025 per email
Phone lookup (caller identification)	$0.045 per lookup

LeadCenter.AI

Contact Us

(888) 291-7116

support@leadcenter.ai

www.leadcenter.ai

Appendix: Features List

LeadCenter.AI

Features List - Marketing

Marketing

Lead Tracking
Lead Tracking
Track forms
Track emails
Track chats
Track phone calls
Lead via Zapier
Bulk upload leads via CSV
Form builder
Landing page builder
Local virtual phone numbers
Toll Free virtual phone numbers
Link Duplicate leads

Lead Intelligence
Call recording
Call transcription
Call id lookup (caller name, phone type, carrier)
Email verification
Lead source
Lead medium
Lead campaign
Track email open and clicks

Virtual Phone Numbers
Local phone numbers
Toll Free phone numbers
Call recording
Assign phone to sources
Inbound lead calls
Send and Receive SMS’s

LeadCenter.AI

Features List – Marketing (Continued)

Marketing

Website Builder
Custom domain
Themes and templates
Landing page builder
Custom form builder
Header and footer builder
Media and images
Blog builder
Automatic redirects builder
Advanced styling
Typography
Advanced coloring
Custom CSS
Custom javascript
Unlimited hosting
Unlimited bandwidth

Page Builder
Visual builder
500+ prebuilt components
SEO options
Landing page without header and footer
Custom coding window
Build page from templates

Events Management (end of Q3 2023)
Create events
Connect external forms to capture registrations
Connect landing
Add organizers and marketing spend
Custom email and SMS confirmations
Push to Redtail

Forms Builder
Visual form builder
Custom fields
Field validation rules
Custom actions
Custom tracking

Email Marketing (end of Q4 2023)
Blast email marketing messages (unlimited volume)
Custom workflows, filters, triggers, and actions
Track emails open and clicks

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Sales Automation

Features List – Sales

Calendars and Appointments
account shared calendar
Individual user calendar
Resource scheduler view
Calendar view
Virtual\physical meeting setting
Business hours setting
appointment confirmation email
Appointment reminders by email & SMS
Custom email and sms templates for confirmation and reminders
Public Calendar link
Redtail Calendar fields sync
Two integration with Redtail Calendar
Two-way integration with Outlook & Gmail Calendar

Lead Engagement
Email templates
SMS templates
Send and receive SMS's
Send and receive Email's
Task management
Assign lead owners

Lead Management
Custom lead stages
Custom fields
Custom actions
Task management
Assign lead owners
Create tasks with reminders
Block spam emails and calls
Lead archiving system

Features List – Sales (Continued)

Sales Automation

Lead Intelligence
Call recording
Call transcription
Call id lookup (caller name, phone type, carrier)
Email verification
Lead source
Lead medium
Lead campaign
Track email open and clicks

Workflows
Custom workflow on contact create and update
Visual workflow design (Q2 2023)
Trigger SMS
Trigger email
Trigger lead update

Call Summaries (Coming in Q1 2024)
Web form based call summaries
Automate creating tasks and activities
Convert to PDF and push to Redtail
Automate assigning tasks to individuals, groups, or departments
Call summary custom templates

Integration
Redtail contacts, calendar, and notes
Zapier
Smart Asset
Outlook
Gmail
WordPress forms

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Features List – Operations

Operations Optimization

Production Tracking
Create AUM and insurance accounts
Track Account values and tax status
Track key dates (engagement sign date, application sign date, and account funding date)
Track account-level production advisor
Automatically calculate fees and advisor commission for each account
Track fees payment received in bank
Track commission paid to advisor for each account
Custom account tax types

AUM Accounts
Add custom custodians
Custom product types
Custom products
Custom AUM fees based on household investment size

Advisor Commission Plans
Create custom commission plans for advisors
Multiple commission rates based on attainment
Track commission payments for each advisor and accounts
Advisor personal attainment dashboard

Annuities and Insurance
Add custom Insurance wholesale providers
Insurance Companies (Carriers)
Insurance product types (ex: FIA, LIFE, FA, etc)
Insurance products
Multiple insurance age ranges and commission levels

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Features List – Analytics and Reporting

Analytics & Reporting

Appointment Performance Reports
1st appointment with new prospects
Advisors next 30 days capacity report
All appointments with new prospect
Redtail appointments Visual report
Business Velocity Report

Production Reports
Production Overview
Production Details
Weekly Production
Yearly Business Profitability Report

Commission Reports
Advisor commission payments
Estimated earned commission report

Marketing Reports
Engagement Report
Lead Analytics Report
Marketing Spend Report
Executive Business Dashboard (tracking ROI and CAC)

Custom reports can be created for your specific business needs

LeadCenter.AI

Additional Features

Multi User System
Multi-users support
Sync email for each user
Sync calendar for each user
Owner, admin, editor, and limited permission support
Manage multiple accounts by a single user

Notifications
Lead notification by email
Daily, weekly, and monthly leads reports by email
Call transcription notification
SMS received notification

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