



INSTITUTE FOR FINANCIAL INDEPENDENCE  
Challenging Conventional Wisdom and Achieving Unconventional Results

# Differentiate Yourself in the Marketplace & Add Value to Your Client Relationships by Becoming a Member of the IFI Network

All of these **DELIVERABLES** are **INCLUDED** in the Program:

## Video Library

Access to our ever-expanding Video Library of Client Conversations



## Documents

These working files are available in multiple formats for usability.

**BASICS:** (can be used as templates)

- Letter of Program Introduction
- Welcome Letters
- Review Letters
- Investment Proposal
- Portfolio Blueprints
- Personalized Intro Brochure
- Co Author Book Opportunities
- Personalized Ad Slicks
- Client PowerPoint Presentations

**UNIQUE CONVERSATIONS / PRESENTATIONS BOOKS FOR CLIENT USE:**

- Cash Flow
- Independence Funds
- Income Generation
- No Out of Pocket Cost
- Compound Tax Lost Opportunity Cost
- Mortgage Costs
- Pension Offset
- Asset Protection
- Asset Protection & Asset Transfer
- RMD
- Beneficiary RMD
- Real Estate Leverage
- Wealth Management

## Case Design Services

Dedicated internal Case Design Specialist who will work with you one-on-one to understand your clients' needs and design and deliver the full IFI presentation

Plus... you'll receive **ADVISOR WORKBOOKS** for internal use to send to your Case Design Specialist

## Monthly Webinars

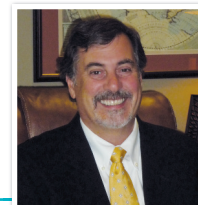
Access to our Monthly Webinars to help you review and understand concepts

## Branded Webpage (optional)

Landing webpage for IFI with your information and branding

## Coaching

Monthly one-on-one coaching call with **John Girouard** or **Michael Loftus** to help you fully understand program concepts and deliver marketing ideas



John E. Girouard



Michael P. Loftus

**MONTHLY PRICING OPTIONS AVAILABLE.** We have several options to meet your specific needs. Please contact a representative for details.

888.453.2713 • [info@independenceinstitute.com](mailto:info@independenceinstitute.com)  
[www.independenceinstitute.com](http://www.independenceinstitute.com)