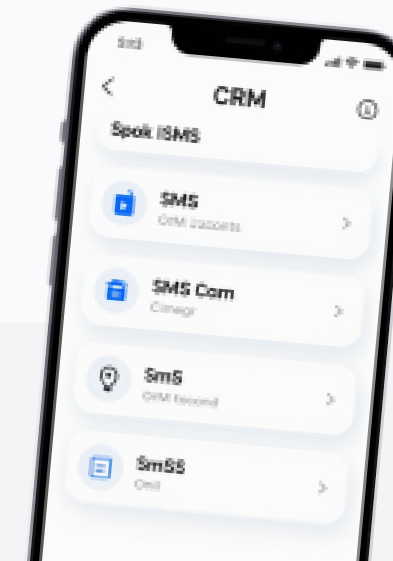
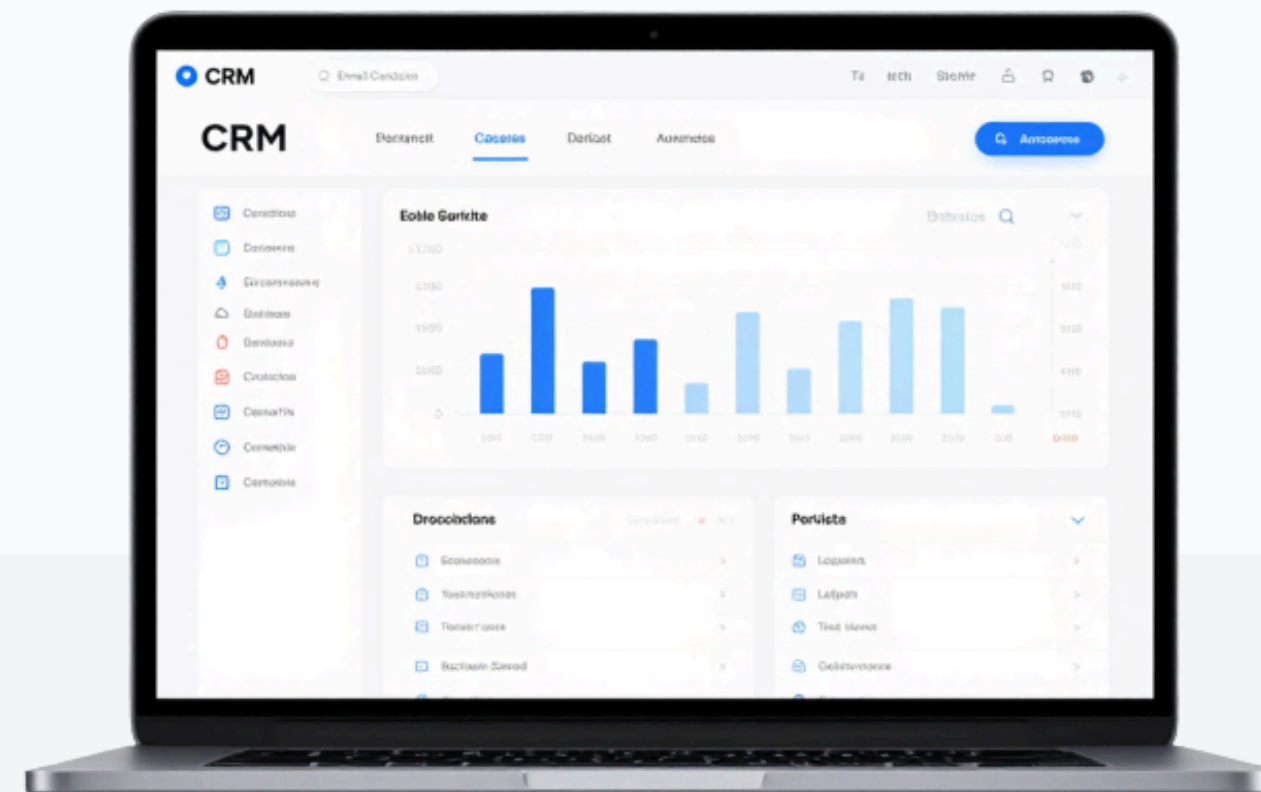


Grow Your Business with an All-in-One CRM Platform for Agents

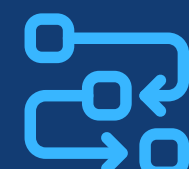
Save Time. Stay Connected.
Close More Business.



Email
Campaigns



SMS
Campaigns



Workflow
Automations



Birthday
Automations

The Challenge

Does this Sound Familiar?

- ✗ Forgetting to follow-up with prospects
- ✗ Spending hours sending individual text and emails
- ✗ Missing client birthdays and important milestones
- ✗ Losing touch with past clients
- ✗ Having no consistent follow-up system



Every missed follow-up is a missed opportunity.

The Solution

Let the CRM Work for You

Our CRM automates your client communication
so you can focus on what matters most —
building relationships and growing your business.



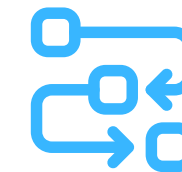
Email
Campaigns



SMS
Campaigns



Birthday
Automations



Follow-Up
Workflows



Automate today. Connect forever.

Real Example: Titus Wealth & Trust

Keeping Clients Engaged Automatically

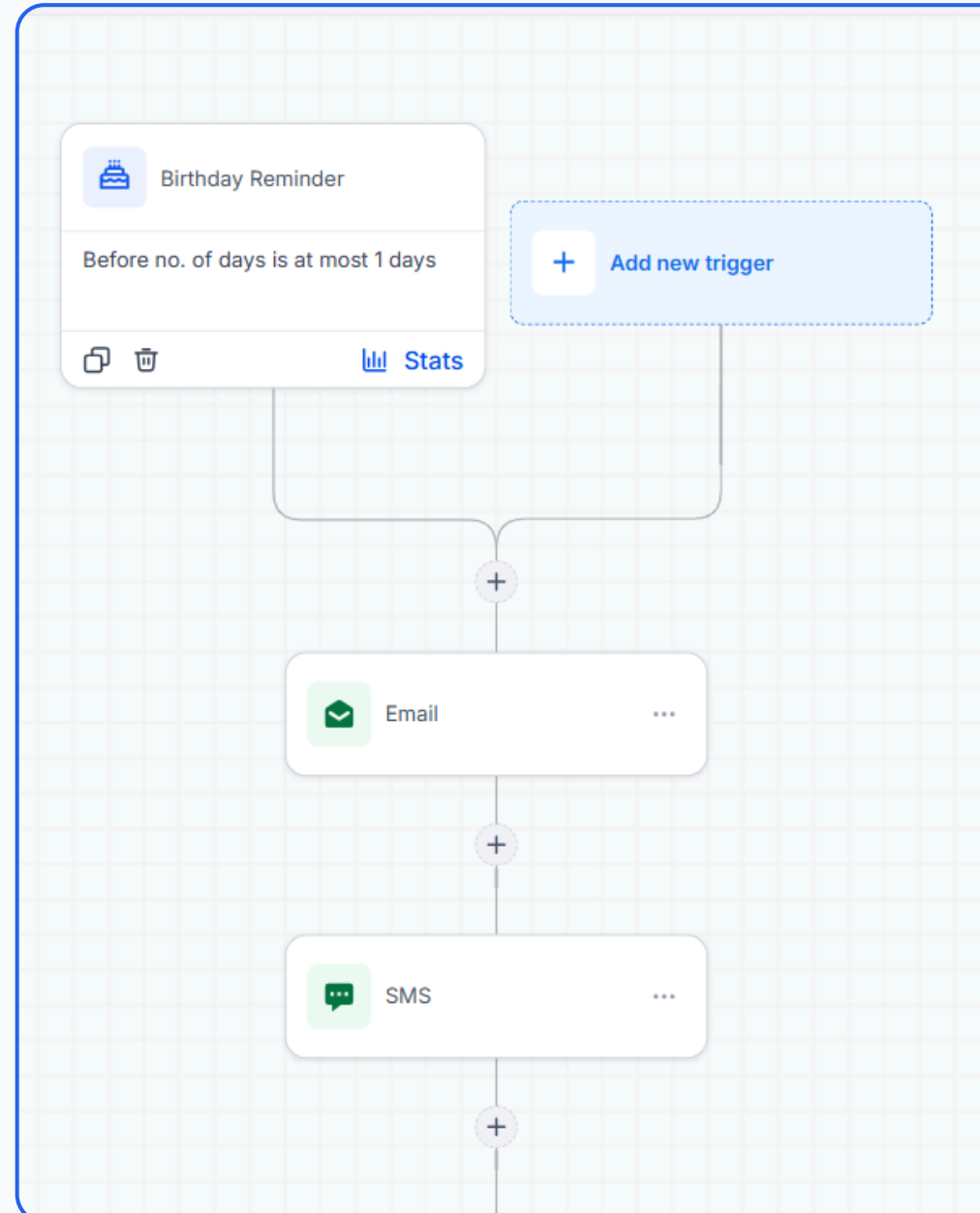
Campaigns

- ✓ Birthday Workflow
- ✓ Monthly Newsletters

Benefits

- ✓ Stay top of mind
- ✓ Build stronger client relationships
- ✓ Deliver value consistently

Birthday Automation



Monthly Newsletter



Real Example: The Real Deal Ins.

Building Relationships that Last

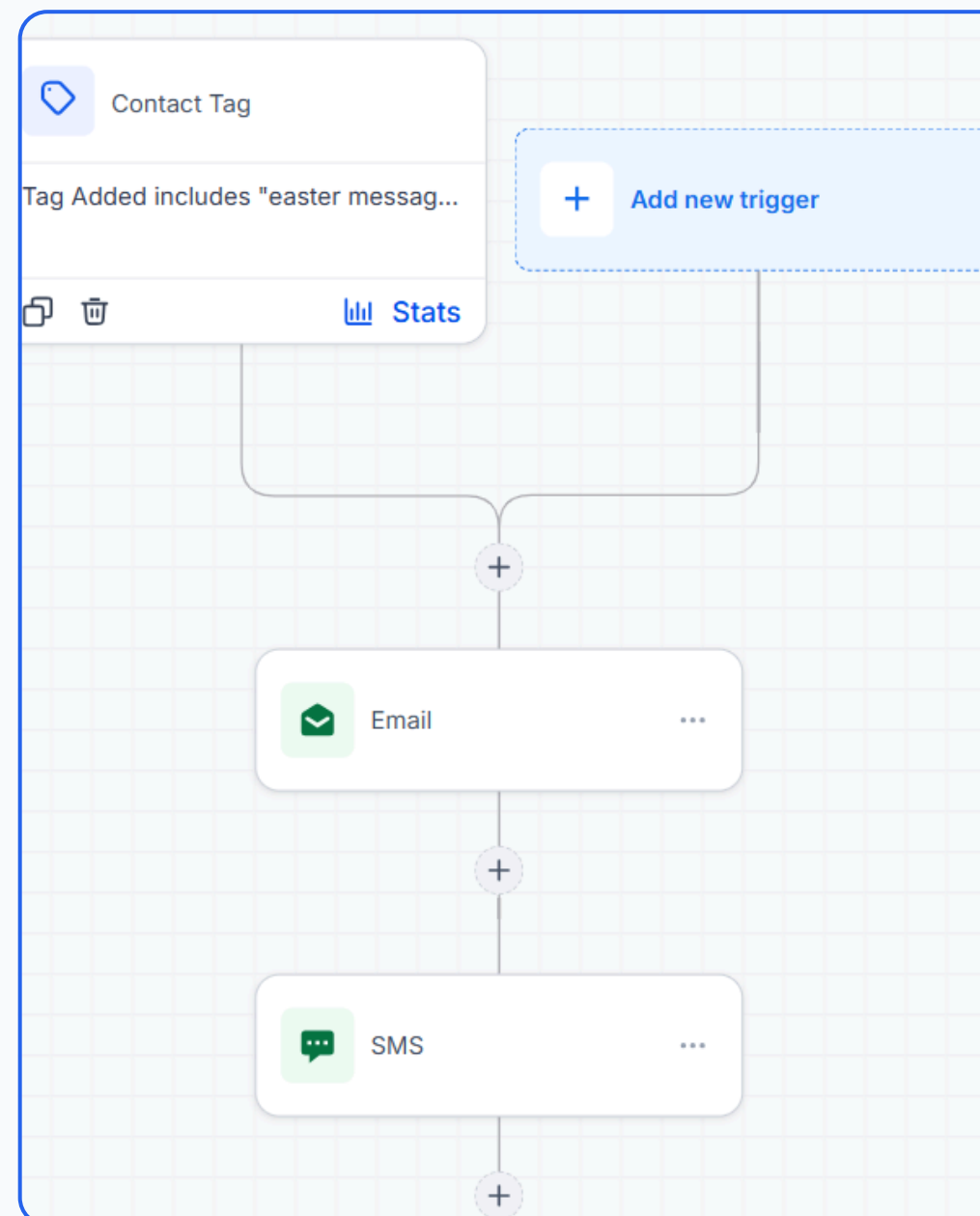
Campaigns

- ✓ **Workflows**
- ✓ **Email and SMS**

Benefits

- ✓ **Stay top of mind**
- ✓ **Build stronger client relationships**
- ✓ **Deliver value consistently**

Workflows



Email Campaign



THAT RELATIONSHIP MATTERS

My Doctor Knows Me.

My medications. My history. My story. Years of trust built one visit at a time. If **Texas Tech Physicians** was part of your healthcare team, your Medicare plan may be changing. **You may be eligible for a Special Enrollment Period** to switch to a plan that keeps your doctor. I can help. It's easy and it's free.

Keep Your Doctor — Call Today

Heather

Real Example: JEH Financial Services

Follow-Up That Get Results

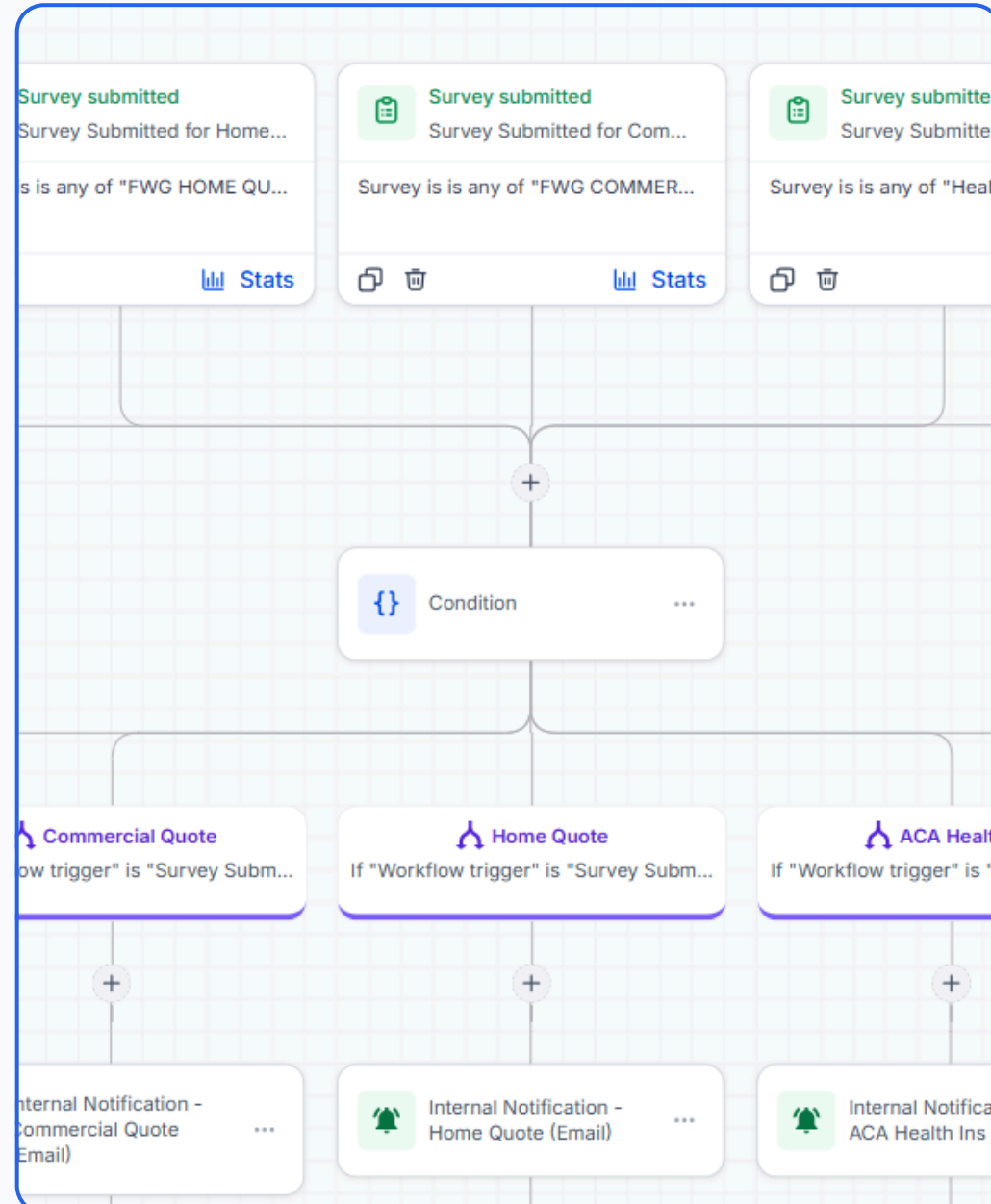
Campaigns

- ✓ Follow-Up Automation
- ✓ Email and SMS

Benefits

- ✓ Stay top of mind
- ✓ Build stronger client relationships
- ✓ Deliver value consistently

Follow-up Automation



Email Campaign



Client Responses

Automation Starts conversation



Hi, this is John Hebert. I hope you and your family are doing well. I wanted to share my website, www.jehfinancials.com, along with my contact info. Please feel free to take a look & share with anyone who may find it helpful. If you ever have questions or want to talk through your financial goals, feel free to reach out anytime—even weekends. Remember, it's just a conversation.

Schedule a Call w/ John:
<https://services.msgsndr.com/urls//wYJ9HQdDdG>
JEH Financials
Reply STOP to unsubscribe.
Thanks, John Hebert | JEH Financial Services

05:00 AM

Jun 22

Hey John. Happy father days.

Do you do any stocks on spacex. Elon Musk's new IPO? Do you have any info on it?

02:31 AM



Hi, this is John Hebert. I hope you and your family are doing well. I wanted to share my website, www.jehfinancials.com, along with my contact info. Please feel free to take a look & share with anyone who may find it helpful. If you ever have questions or want to talk through your financial goals, feel free to reach out anytime—even weekends. Remember, it's just a conversation.

Schedule a Call w/ John:
<https://services.msgsndr.com/urls//vA3bXIhQZ>
JEH Financials
Reply STOP to unsubscribe.
Thanks, John Hebert | JEH Financial Services

05:00 AM

Jan 16

Jan 27

who may find it helpful. If you ever have questions or want to talk through your financial goals, feel free to reach out anytime—even weekends. Remember, it's just a conversation.

Schedule a Call w/ John:
<https://services.msgsndr.com/urls//PbcusS2jG9>
JEH Financials
Reply STOP to unsubscribe.
Thanks, John | JEH Financial Services

05:01 AM

Feb 6

This is Tom [redacted]. All is good and retirement is way better than I thought. I have two areas where I could maybe use your expertise. In 2000 I signed up with a financial provider that did not go well. Her firm gave me counsel on how to set up medicare and although I am not having problems that I know of, I would like a second opinion. I also invested in what was supposed to be a for sure deal that is in the courts and I believe the advisor is in jail and her a firm is shut down.

Again, just looking for a review and a new place to invest if the funds can recovered.

If this sounds worth while, maybe we can do lunch--on me and discuss. I will be back in SA Saturday. The best way to connect is a text and I will call back.

who may find it helpful. If you ever have questions or want to talk through your financial goals, feel free to reach out anytime—even weekends. Remember, it's just a conversation.

Schedule a Call w/ John:
<https://services.msgsndr.com/urls//4HOBjJhhhd>
JEH Financials
Reply STOP to unsubscribe.
Thanks, John [redacted] | JEH Financial Services

05:01 AM

Feb 5

Hi John

This is Roxy

A friend of ours is asking for your info for her husband to get on Medicare

She asked me if you also do health insurance for her

She is 61

Client Responses

Automation Starts conversation

Review: Retirement, Health Insurance, Life Insurance
(Phone Call)
<https://api.leadconnectorhq.com/widget/bookings/titusphonecall>

Becca
<https://tituslife.com/>
Titus Wealth & Trust

10:07 PM

Jun 27

New

AC Thank you

As we head into Memorial Day weekend, we pause to remember and honor the brave men and women who gave everything for our freedom. us

Wishing you and your family a safe, meaningful, and blessed Memorial Day weekend.

— Becca
Titus Wealth & Trust

11:34 PM

New

DF Thank you Becca ❤️❤️ Many BLESSINGS!!

Jun 16

Hi Lynn , this is Rebecca from Titus Wealth & Trust. Have you already enrolled in Medicare, or are you still reviewing your options? Reply YES if you'd like help reviewing your coverage

02:3

oicemail

0:00 / 0:13 1x 🔊 ↺ ⬇

I recently sent you information regarding a complimentary Retirement & Tax Strategy Review.

If you'd like to discuss retirement planning and strategies that may help improve tax efficiency in retirement, I'd be happy to help.

You can schedule here:
<https://api.leadconnectorhq.com/widget/bookings/rebecca-titus-personal-calendar-u89hxcyol>

02:20 AM

New

LT Not at this time thank you

Client Responses

Automation Starts conversation

need related to your Health Insurance needs.

Health Insurance Review
(Phone Call)
<https://api.leadconnectorhq.com/widget/bookings/realdealphonecall>

Doug & Heather
<https://fwgpartners.com/therealdeal>
The Real Deal Insurance

04:02 AM ;

JC Thank you Doug and Merry Christmas to you and Heather as well!
May God bless yall richly this year!!

Health Insurance, Retirement, Life Insurance Review (Phone Call)
<https://api.leadconnectorhq.com/widget/bookings/realdealphonecall>

Doug & Heather
<https://fwgpartners.com/therealdeal>
The Real Deal Insurance

09:05 PM ;

DL Thank you very much!
I put in a request to have the wind turned down. We'll see if someone is listening!

need related to Health Insurance, Retirement or Life Insurance needs.

Health Insurance, Retirement, Life Insurance Review (Phone Call)
<https://api.leadconnectorhq.com/widget/bookings/realdealphonecall>

Doug & Heather
<https://fwgpartners.com/therealdeal>
The Real Deal Insurance

09:09 PM ;

RM Doug, do you handle renters insurance ?

Medicare Review (Phone Call)
<https://api.leadconnectorhq.com/widget/bookings/realdealphonecall>

Heather
<https://fwgpartners.com/therealdeal>
The Real Deal Insurance

11:01 PM ;

May 24

AB Hi, I've been meaning to call you. I had to move back to New Mexico, to help my daughter she's been ill. So if you can call me sometime next week. Have a wonderful memorial weekend.

Why it Matters

With Your CRM Sub-account, You can:



Stay connected with every client



Never miss an important follow-up



Save hours each week with automation



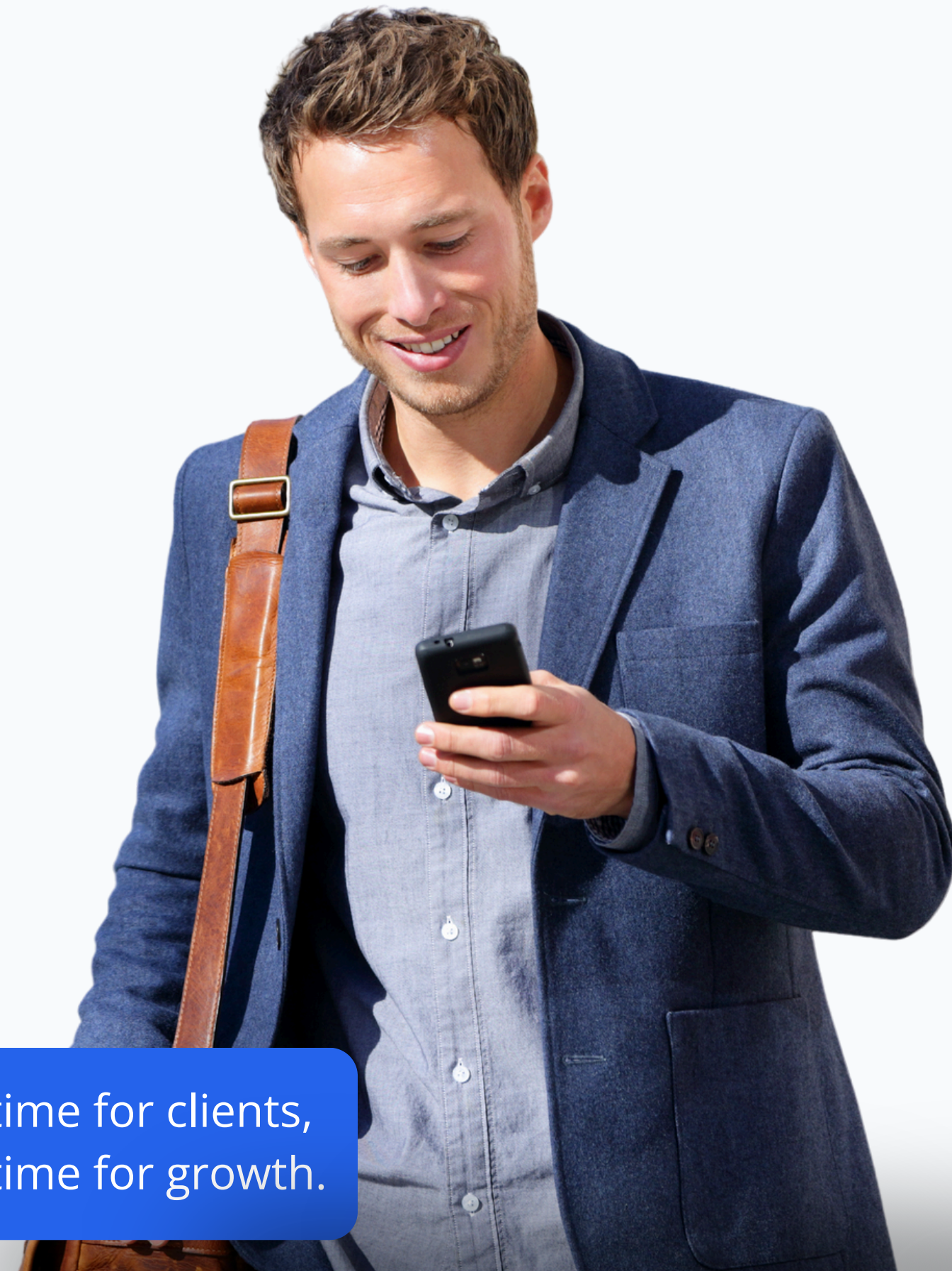
Keep clients engaged long after the sale



Create a more professional client experience



Build trust through consistent communication



More time for clients,
More time for growth.

Why Agents Choose Our CRM



Automated Email Campaigns

Reach more clients with less effort.



SMS Campaigns

Instant communication that gets responses.



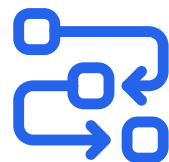
Birthday Workflows

Celebrate clients automatically.



Contact Management

All your clients in one place.



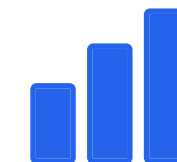
Workflow Automation

Streamline follow-ups and save time.



Document Storage

Upload licenses, certifications, and important documents



Reporting & Insights

Track performance and campaign results

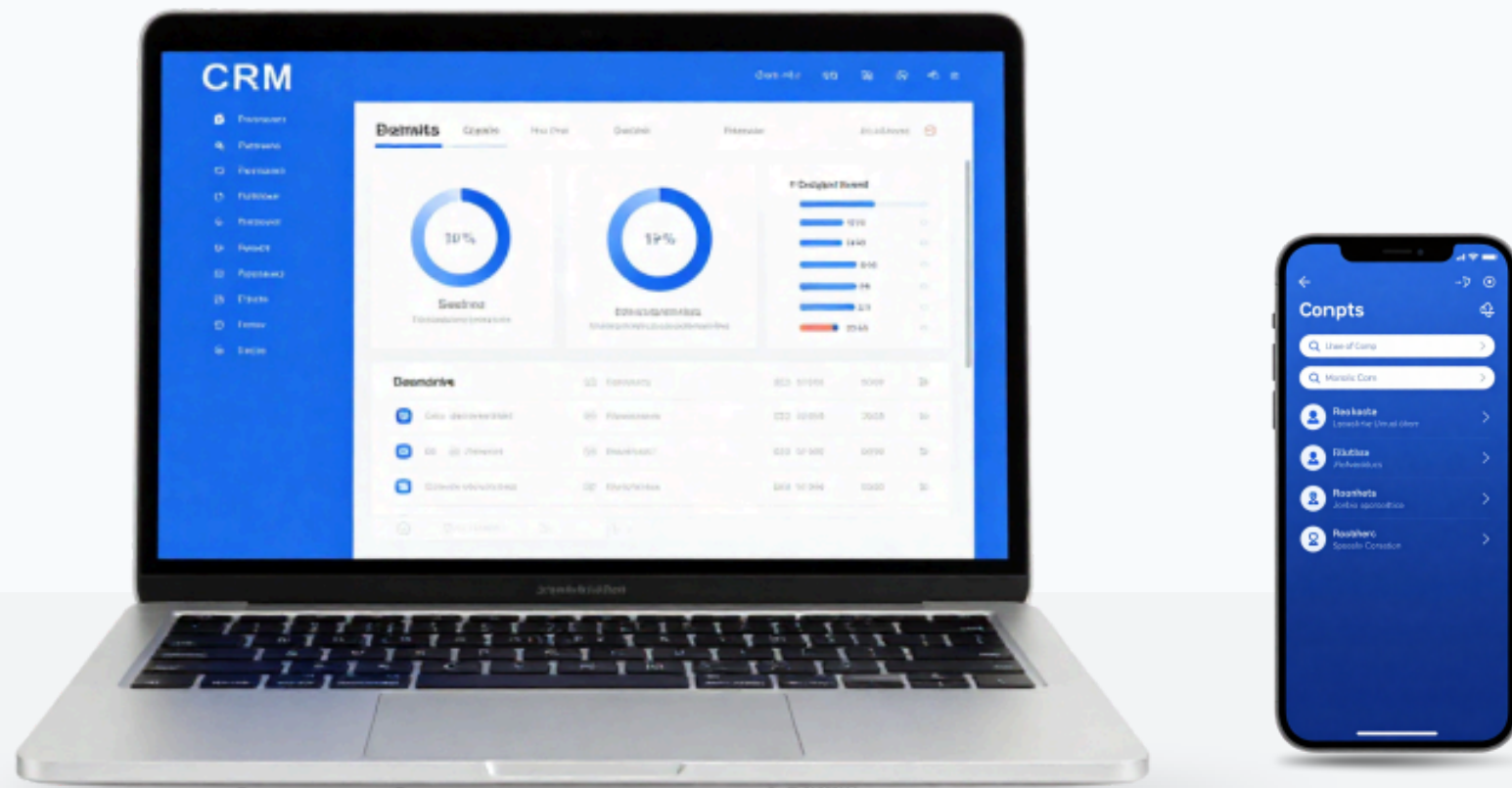


Secure & Reliable

Your data is safe with us.

Ready to Grow Smarter?

Let Automation Work for You 24/7



- ✓ Save time
- ✓ Stay organized
- ✓ Build stronger relationships
- ✓ Close more leads
- ✓ Grow your business



Get your own CRM sub-account today
and start working smarter, not harder.



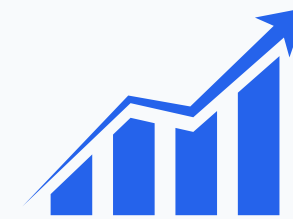
**Join the agents who are already
growing their business with automation.**



Save Time



Strengthen Relationships



Grow Your Business

Let's grow together!