

AS AN ADVISOR OR BROKER, IT'S HARD GETTING YOUNG PEOPLE TO SPEAK YOUR LANGUAGE. SO LET'S SPEAK THEIRS.

Make it easy. Give them control. Get rid of the fancy terminology. And of course, hand out the latest tool.

In the next ten years, 30 trillion dollars will transfer to the millennial generation. The question is, how will you reach them? Because yesterday's approach doesn't seem to cut it, and this opportunity is too huge to miss.

Start by giving them something nobody else can. Do it online, because that's where they live. And make it simple, because that's what they like. Give them Melius.

Melius allows consumers to easily establish and manage their own financial plan. And unlike other programs, it's product neutral – taking into account insurance, savings, mortgage and investments in relation to life stage and income. It also gives you a current picture of your clients and prospects, which leads to smarter dialogue and timely recommendations.

HOW IT WORKS

1. Data

Your clients and prospects enter basic financial information, allowing us to look for inefficiencies and identify their next steps.

2. Score

Based on that information and our industry experience, we create a Melius score. Clients and prospects can compare their score with peers and national averages.

3. Improvement

With your help and Melius software, clients and prospects can work toward improving their score and getting to a better financial position. And as scores improve, so does Melius. We continually test each financial plan to gauge how it responds to life events. Because life changes, but momentum doesn't have to.

THE PITCH

Be one of the first to use the Melius tool. If you like it as much as we think you will, then take advantage of our introductory offer. For only \$125* per month, you can give Melius to as many clients and prospects as you wish.

We believe this simple action is the perfect way to start a valuable relationship with anyone who desires to better manage and maximize their money.

TRY MELIUS TODAY
CALL OR EMAIL FOR YOUR FREE ACCESS
508-443-1333
info@getmelius.com

**Rate is for a limited time only. Call or email today for your access and test the Melius tool for free.*

“Where do I start?”

That’s the most common thing people say when it comes to planning their financial future. Having worked as advisors ourselves, we’ve heard it countless times. Melius is our answer to that important question.

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