

A photograph of an elderly couple sitting at a desk, looking at a laptop. The image is overlaid with a teal tint. The woman is on the left, smiling, and the man is on the right, wearing glasses and smiling.

ANNUITIES

CASE STUDY

Ron Ray
Overview

THE CHALLENGES

Annuities are niche investment products commonly used for retirement planning.

Fees, fear, and misconceptions are three of the main things that can keep people from buying annuities. For us, the biggest challenge was to avoid fear-based advertising but still create something that **motivated people to act**. We wanted to avoid terms like “destroy” and “devastate” and Facebook has certain rules about what you can and cannot say — otherwise the ad account could be shut down.

We knew the client was targeting a niche demographic in terms of age, location, and interests.

THE SOLUTION

We put together a social media marketing strategy to reach prospects in **Texas**. After creating Facebook ads, we made a landing page and ran an email drip campaign in SAMSON.

Over time, we updated the FB ad based on rising interest rates and market trends — which took the user to a new landing page that included a short quiz, aka a retirement “stress test.”

THE RESULTS

Client spent \$5,796.63 in one year.

We generated 103 leads, over 100,000 impressions.

We calculated the average **lifetime** value (CPL) to be **\$60.96**. So, a CPL of **\$56.28** was noteworthy. The client was able to convert these leads into new business.

