TESTIMONIALS

"I have been using RBG Concepts for about three months and think it is one of the best things that M&O has made available! It is very easy to use, and my clients love it. In a short four-page format, it shows clients how much risk they are undertaking in their portfolios and makes them more apt to buy safer financial products like fixed index annuities."
– William D., Indiana

"I had never sold a fixed index annuity in my career, but using the training I received from the RBG process, my very first case was $1,000,000 in premium."
– Neel S., New Jersey

"RBG is super simple. It's a great deliverable to the client and is the best shiny object you could ever offer. RBG provides a process that takes away the fear of the unknown for both the financial professional and the prospect. It has fundamentally transformed my business and is a major reason our office is on pace to do $75 million in FIA premium and $25M in AUM this year."
– Michael F., Michigan

The simplest software in the industry is increasing financial professionals' production by

2x, 3x, 4x, 5x!

Even better is that this software was made by a financial advisor for you!

REDBLUEGREEN is available exclusively through M&O Marketing.
Call one of our industry-leading Marketing Consultants at
(800) 228-5964
or
visit www.RBGsoftware.com for more information!

M&O Marketing

REDBLUEGREEN CONCEPTS

WHAT IS REDBLUEGREEN?

Curt Whipple, founder of C. Curtis Financial, was making $250,000 in revenue before he created REDBLUEGREEN Concepts, a cutting-edge, user-friendly software that took his bottom line from a few million dollars of FIA premium to over 20 million of FIA premium within a single year!

Curt stood out from his competition by helping his clients get what they actually wanted – not by just selling them a particular product. Best of all, clients walked away with a better understanding of how their financial assets were going to work for them throughout retirement, and they received documentation supporting the financial recommendation.

From online tutorial videos of Curt showing you how to navigate the software to scripts of how to explain the outputs to clients, we have you covered with every tool you will need to present a better case to prospects.

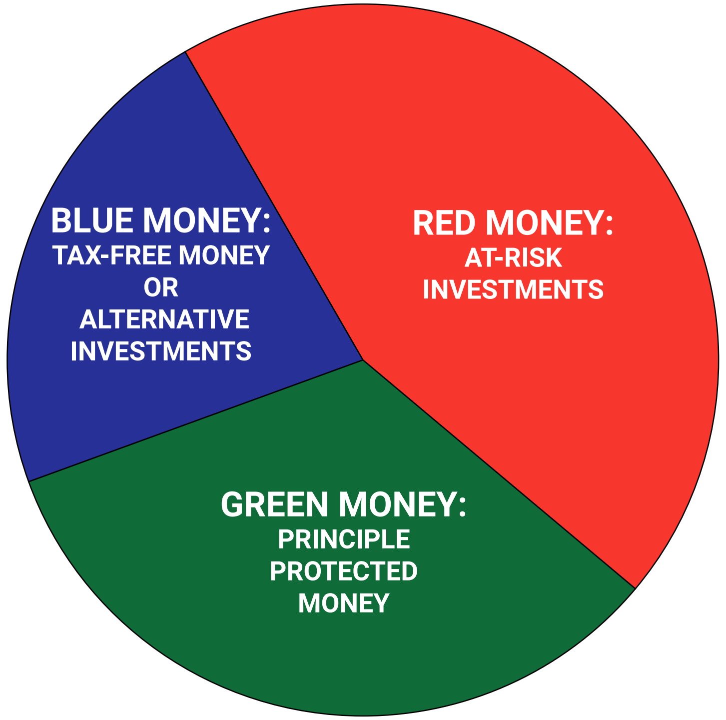
REDBLUEGREEN CONCEPTS

WHY RBG WORKS!

- Plan Over Product Mindset
- Builds Relationships
- Creates Credibility
- Decreases Skepticism
- Better Record-Keeping
- Provides A Sales Process
- Eliminates The Unknown
- Creates Opportunities
- Increases Trust
- Better Sales

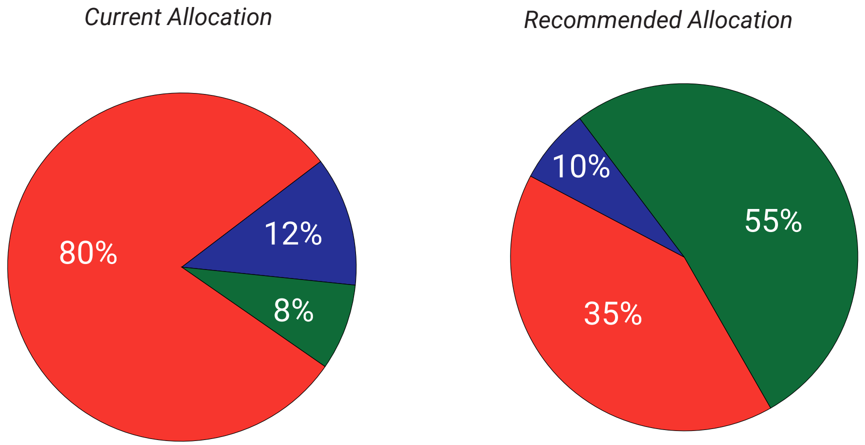
Designed for all financial professionals to use!

RBG documents your sales process by categorizing a client's money into...



THE RBG PROCESS

After taking your fact-finder, simply input the prospect's financial information into the software. The output will then show his or her future sources of retirement income that he or she has and then what category of money it is: Red, Blue, or Green?



By providing prospects with just a simple graph of how their retirement assets are currently allocated, RedBlueGreen gives prospects a brand new perspective of how they actually want their assets to work for them in retirement. Are they comfortable with the current amount of risk in their portfolios or would they prefer to have more of their money in a principle protected financial vehicle like a fixed index annuity?