



What's New for 2016

Here is a summary of the changes we're making as we enter the New Year. All of the changes we made are focused around one goal: getting you **MORE** of the **BEST** leads possible!

FinAuction.com is now Financialize.com

We have changed our name to reflect our growing business and lead programs that go beyond our traditional Auction Format. Please note:

- Your Login information has NOT changed
- Your account / lead information has NOT changed
- Credit Card charges will be listed as FinAuction or Financialize
- Emails will now come from financialize.com, instead of finauction.com

New Lead Management Center (LMC)

We've updated your Lead Management Center! See the screen shots at the end of this document.

- More information at your fingertips to view leads, monitor your program, make updates
- County Territory Scores to gauge your lead flow
- Interactive map to help you build your territory

County Targeting

All agents in all programs have been updated to "County" targeting (instead of Zip Code + Radius). Most agents have already been updated in recent months, however making this the case for all agents provides us with some huge advantages:

- We can now "Target" specific counties for lead generation (Scrub & Elite Programs)
- We can now better forecast lead flow for your territory

Territory Score Feature*

We've added a new feature on your LMC that shows you the % of leads you should expect to receive from us, on a per-county basis.

- Allows you to gauge your lead flow with us
- Shows you how "competitive" your territory is
- Provides a tool to help you increase your lead flow

* This score is based on population, demographics, your selected program(s) and agent competition.

Monthly Budget Feature (Scrub & Elite Only)

We have refined our use of the "Monthly Budget" (the amount you are targeting to spend on leads with us each month).

- If you have Elite Status and a monthly budget of at least \$2,500, our system will AUTOMATICALLY turn on your counties for Google & Bing – guaranteeing a higher lead flow of the best quality leads.
- If you have the Scrub Program and a monthly budget of at least \$2,500, we can manually adjust your counties on Google & Bing.



***** **PROGRAM CHANGES** *****

Elite Program

- One County Option
You now have the option to select a single county for Elite Status. This is a great way to “test” the Elite Status if you have never bought the highest quality, most expensive leads.
- Home County Feature
Our system will look to assign a lead to an agent who lives in the same county as the prospect, before looking for other agents. This allows us to better “target” the counties you cover.

Scrub Program

- Age Classification
In order to simplify the program, we have removed the different age classifications for leads. All scrub leads will now be between 45 and 79 years old (the average lead is 65 years old).
- Scrub Lead Prices
All Scrub Leads are now priced at \$199.

Auction Program

- Auction Length
The Auction length has been extended to 24 hours, giving you more time to see each lead (the buy-it-now feature still allows agents to end the auction immediately for leads they covet).
- Auction Prices
We’ve lowered the price of Auction Leads by as much as 25% for some categories, to encourage agents to participate more in the program.
- Daily Auction Wrap
We’ve added a “Daily Auction Wrap”, a once-a-day email that will show you ALL the auction leads available in your area.
- New “Financial” Category
You will see a new category of leads in auction, called “Financial Leads”. These are prospects that did not fit into the “annuity” category, but who still represent a viable lead. Examples are prospects under age 40, or with smaller saving amounts, or that have their money locked in a 401(k). These leads are priced 30 to 50% less than Annuity leads.

Discount Lead Program

- More Leads / Lower Prices
You will a greater flow of leads into this program, including “aged” leads – all at lower prices.

Google Search Lead Program: Discontinued

- This program has been eliminated. The leads that were sold via this program will now be put directly into the auction, giving you more chances to see / purchase leads.



***** Screenshots of New System *****

Agent Portal / Dashboard

Financialize
Welcome **Dev_test** [Logout](#)

- [Dashboard](#)
- [My Leads](#)
- [Auction Leads](#)
- [Discount Leads](#)
- [Programs](#)
- [Settings](#)
- [Resources](#)
- [Contact us](#)
- [Log Out](#)

Welcome to your Lead Management Center

Happening Now: IN AUCTION IN DISCOUNT

Recent Leads

Date	Name	Savings	Details
You have not purchased any leads.			

Leads YTD: **0** \$ YTD: **\$0** [VIEW ALL](#)

Program Status

Elite Status: ✖ [VIEW](#)

Scrub Leads: ✖ [VIEW](#)

Auction Leads: ✔ [VIEW](#)

Monthly Budget

Your Budget: **Unlimited** [EDIT](#)

MTD Spend: **\$0**

% of Budget: **0%**

Lead Flow Indicator

Lead flow is based on the size of your territory, the Lead Programs you've signed up for, and the # of agents we have competing against you. The 'Territory Score' shows the approximate % of leads you would get across the counties you cover. [How to get more leads?](#)

Territory Score: ?

5%

Population ?

227,519

* Total of your counties

Your Counties ?

State	County	Population	% of Leads to Expect	Action
AK	Yukon Koyukuk	6,604	<div style="width: 5%; background-color: orange;"></div> 5%	View
AK	Bethel	17,419	<div style="width: 5%; background-color: orange;"></div> 5%	View
AK	Denali	2,103	<div style="width: 5%; background-color: orange;"></div> 5%	View
AK	Matanuska Susitna	87,161	<div style="width: 5%; background-color: orange;"></div> 5%	View
AK	Fairbanks North Star	99,876	<div style="width: 5%; background-color: orange;"></div> 5%	View

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[VIEW ALL](#)

County Table

Territory Score: ?

6%

Population ?

3,178,257

* Total of your counties

Your Counties ?

State	County	% of Leads to Expect	Action
CA	Marin	<div style="width: 6%; background-color: green;"></div> 6%	View
CA	Yolo	<div style="width: 50%; background-color: green;"></div> 50%	View
CA	Santa Clara	<div style="width: 13%; background-color: green;"></div> 13%	View
CA	San Francisco	<div style="width: 13%; background-color: green;"></div> 13%	View
CA	Lassen	<div style="width: 100%; background-color: green;"></div> 100%	View

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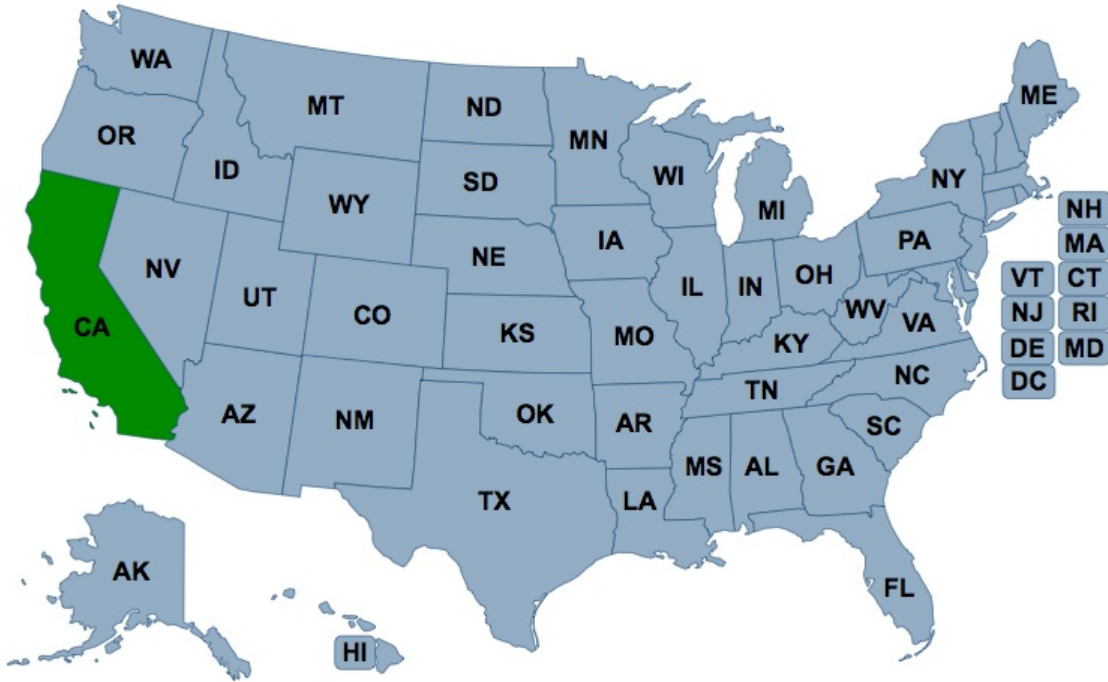
[VIEW ALL](#)

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Interactive Map to Build Territories

Create your Territory : Use the map below to select the counties that will make up your territory. The more counties you select, the more leads you'll receive. Click on the NEXT button under the map when you're done.



State	County	Population	% of leads to Expect	Action
California	Marin	255,262	<div style="width: 6%;"></div> 6%	REMOVE
California	Yolo	222,084	<div style="width: 50%;"></div> 50%	REMOVE
California	Santa Clara	1,827,093	<div style="width: 13%;"></div> 13%	REMOVE
California	San Francisco	813,783	<div style="width: 13%;"></div> 13%	REMOVE
California	Lassen	35,035	<div style="width: 100%;"></div> 100%	REMOVE

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SAVE CANCEL

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