
Wealth2k Introduces Social Security Wise™

By Editor Test Tue, May 28, 2013

"The major challenge facing advisors today isn't analysis, it's prospecting," claims David Macchia of Wealth2k. His company's new product for advisors combines Social Security claiming analysis and a prospecting strategy into a single content-marketing tool.

Aggressive financial advisors are always looking for ideas to pitch to their clients—either to generate revenue, to justify their asset-based fee, or merely to stay in touch.

Sometimes these ideas hide in plain sight—like strategies or software to optimize Social Security benefits—until someone identifies their value. Then everyone else picks up on it.

Wealth2k has introduced [Social Security Wise](#), a “turnkey prospecting solution” or content-marketing solution that can “help advisors build a bridge to consumers who need assistance in crafting retirement income plans,” according to a release from Wealth2k. The monthly subscription cost is \$45/month. There is no term commitment.

According to Wealth2k Founder & CEO, David Macchia, “Software programs have made it easy for advisors to analyze the results of different Social Security claiming strategies. This has been an important development. But the major challenge facing advisors today isn't analysis, it's prospecting. Social Security Wise fills a gaping need in the marketplace for a compliant, consumer-facing solution that generates new prospects for retirement income planning.”

Social Security Wise aims to provide these benefits for financial advisors:

- Advisor-branded Social Security Learning Center
- Prospecting tool
- Lead-generation strategies
- Compliant content (FINRA comment letters covering Social Security Wise content are available on request.)
- iPad, iPhone and Android device compatibility
- Income planning discussion openers
- Google AdWords marketing module
- “Drip” mailing campaign tools to drive traffic to the advisor’s website
- Integration with social networking sites

Wealth2k, Inc., based in suburban Boston, provides *The Income for Life Model*, an advisor-centric retirement income solution for mass-affluent investors, among other products and services.