

# Affiliate Marketing Program



Seeding Growth With Affiliate Marketing

Asset Exchange Franchise Network™ Inc  
Business Development Team  
866-683-5228





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## About Asset Exchange Franchise Network™ (AEFN)

### Asset Exchange Franchise Network, Inc.

Asset Exchange Franchise Network, Inc. is the company that manages and provides the franchise license to potential franchisees. Asset Exchange Strategies (AES) is the first franchise model as a “company store”.

We are the national advisors for self-directed wealth building whose purpose is to provide investment products and services, to educate individuals, and potential business owners about the benefits of Self-Directed IRAs and Self-Directed 401(k)s.

Our marketing methodology, proprietary processes, human capital and excellent reputation in the market has resulted in success. As a result of our success we have now franchise our business model for franchisees to share in our success.

[Daniel Cordoba \(link to bio press kit\)](#) is the Founder and President of AEFN and AES. You should know this about these companies:

- Industry pioneer in self-directed retirement plans
- Recognized 'knowledge leader' in self-directed retirement solutions
- AES has a BBB A+ rating since 2004
- AES has an estimated 50 client plans audited resulting in no audit issues with entity structures
- Both offer access to an extensive library of published books & education materials
- AEFN does not compete with their Affiliate companies
- AES business awards Include:
  - Best of Financial Services, 2009 by U.S. Commerce Association
  - Best in Client Satisfaction, 2009 by Crescendo For Texas Monthly Magazine

Our clients receive the knowledge, expertise, and tools to use those tax dollars to create wealth for them and their families for generations to come. We have the benefit of the expertise of tax attorneys, CPAs, other financial experts, and industry experts to find the appropriate methodology and tools.

Our marketing methodology, proprietary processes, human capital and excellent reputation in the market has resulted in success.

As a result of our success we now offer participation in our Affiliate Marketing Program, which is designed to provide the marketing support, strategies, and expertise that will assist you in capturing self-directed investment dollars.



We have created and perfected our business model over many years and are very successful in the same business for over nine years; we are the recognized “knowledge leader” in self-directed retirement solutions.

### **Who We Market To**

The demographic target we market to is comprised of individuals and investors who are typically entrepreneurs; business owners and executives who desire to have more control over their financial lives.

This desire of being self-managed and controlling their destiny is very important to this market participant, in addition:

- ✚ Asset management outside of the stock market is also a key interest for our clients. Assets such as real estate, tax liens, private notes are an earmark of investors that are looking for better control and measured risk.
- ✚ Tax recovery and wealth strategies are important to our clients. They value the work it took to earn their wealth and are open to compliant tax strategies that will reign in lost tax dollars and place them in lower tax brackets in the future.
- ✚ Ability to use retirement funds to capitalize investments mentioned earlier on a passive basis as well as the opportunity to fund an operating enterprise with retirement dollars is also important to our clients.

Our product line is all encompassing, and we continue to design and add additional products to meet market needs, and they are designed to provide investment structures that are compliant to tax laws and other federal regulations.



We offer the following products and services to our target markets:

AEFN PRODUCTS	Additional Services Available Individually or Bundled	
<ul style="list-style-type: none"> <li>✚ Self-directed 401k plans</li> <li>✚ Self-directed IRA plans</li> <li>✚ Custodian Service</li> <li>✚ Investments – Non-traditional options</li> <li>✚ Standard 401k – Stock market related</li> <li>✚ AEFN Franchise Business</li> <li>✚ Legal Entities/LLC, C-Corp, DBA</li> </ul>	<b>Marketing Tools</b> <ul style="list-style-type: none"> <li>○ CRM System</li> <li>○ Emailing Marketing</li> <li>○ Print Media</li> </ul>	<b>Legal Entity Setup</b> <ul style="list-style-type: none"> <li>○ DBA's</li> <li>○ LLC's</li> <li>○ Corporation's</li> </ul>
	<b>Financial</b> <ul style="list-style-type: none"> <li>○ Investments</li> <li>○ Accounting Service</li> <li>○ Retirement Plans</li> </ul>	<b>WEB Services</b> <ul style="list-style-type: none"> <li>○ Web Site Template</li> <li>○ Web SEO</li> <li>○ Web Analytics</li> </ul>





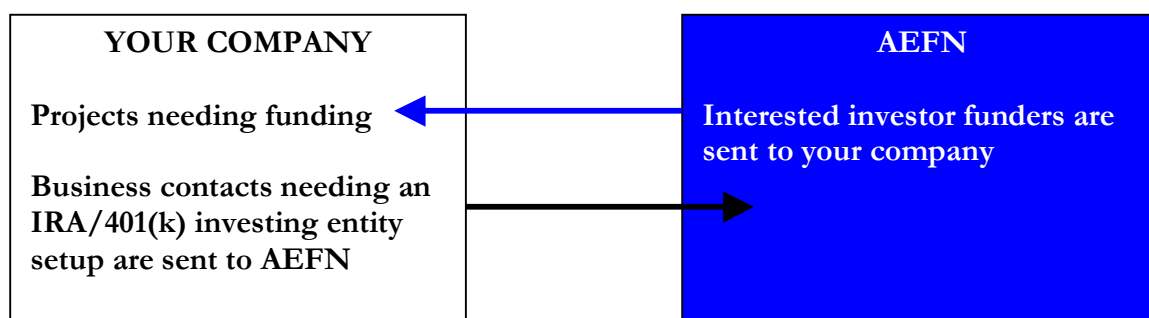
## AEFN Affiliate Marketing Program

### WHAT IS THE AEFN AFFILIATE MARKETING PROGRAM?

Our Affiliate Program supports companies seeking investment dollars for their investment opportunities. The program is designed to be integrated with the Affiliate's existing marketing program and enhance it so that market share and revenue can be increased with self-directed investment dollars.

On your behalf, we market our self-directed investment plans to individuals, businesses, and experienced investors. Our marketing strategy also includes promotion of your company and your investment opportunities.

We do not compete with our Affiliate companies, and we provide complimentary no-fee marketing activities; in return we require being the exclusive company you work with to acquire, and to process self-directed investment dollars. There is a qualification process, we require a contractual agreement, and there may be a minimal setup fee for participation.



### WHY BECOME AN AEFN AFFILIATE?

We understand what you need, and that the most compelling reason for you to enter into our Affiliate Marketing Program is to access investors to fund your projects. We have extensive marketing experience to self-directed investors.

Our motivation is to have more clients to process, and our goal is to enhance your ability to fund your investment opportunities, close more deals and increase your revenue stream.



We accomplish this by:

- Executing consistent marketing activities to potential investors
- Finding and vetting potential self-directed investor funders
- Setting up and processing the self-directed investment entities
- Providing you access to knowledge and support

The service we offer amplifies your current marketing efforts, and over time brings new investment dollars and creates exposure for your projects.

Our Affiliate Marketing Program is a win-win and will assist in successfully obtaining the investors you seek while providing us with additional self-directed investment clients to process. We conduct progressive and consistent marketing activities.

## **AEFN ESTABLISHED AND PROVEN BUSINESS MODEL**

With our service much of the work that goes into targeting investors, designing the offering, preparing marketing materials, and designing sales strategies is done for you.

You benefit from AEFN successful business model:

**Market Readiness** - Now more than ever before individuals are seeking opportunities that allow them to direct and control their retirement investment dollars. This is creating the need for investments that accommodate the goals of passive and active investors.

**All Encompassing Product Line** - We offer a diverse product line to accommodate the self-directed retirement investor's needs.

**Established Brand** - As a pioneer in the industry, we (AEFN) are the recognized leader in self-directed retirement plans and have the most extensive education library on the topic in the nation.

**Proven Business Plan** - Over a period of ten years we have developed and honed its marketing and sales activities to achieve success in building our client base and level of client satisfaction.

**Consistent Marketing** – We have years of experience in reaching our target market(s) and successfully launching products and implementing marketing campaigns using a variety of methods including social media, email, webinars, web sites, and more.

**Technology Platform** – Our CRM system, backend processing system, and our operations teams set us apart from the pack.

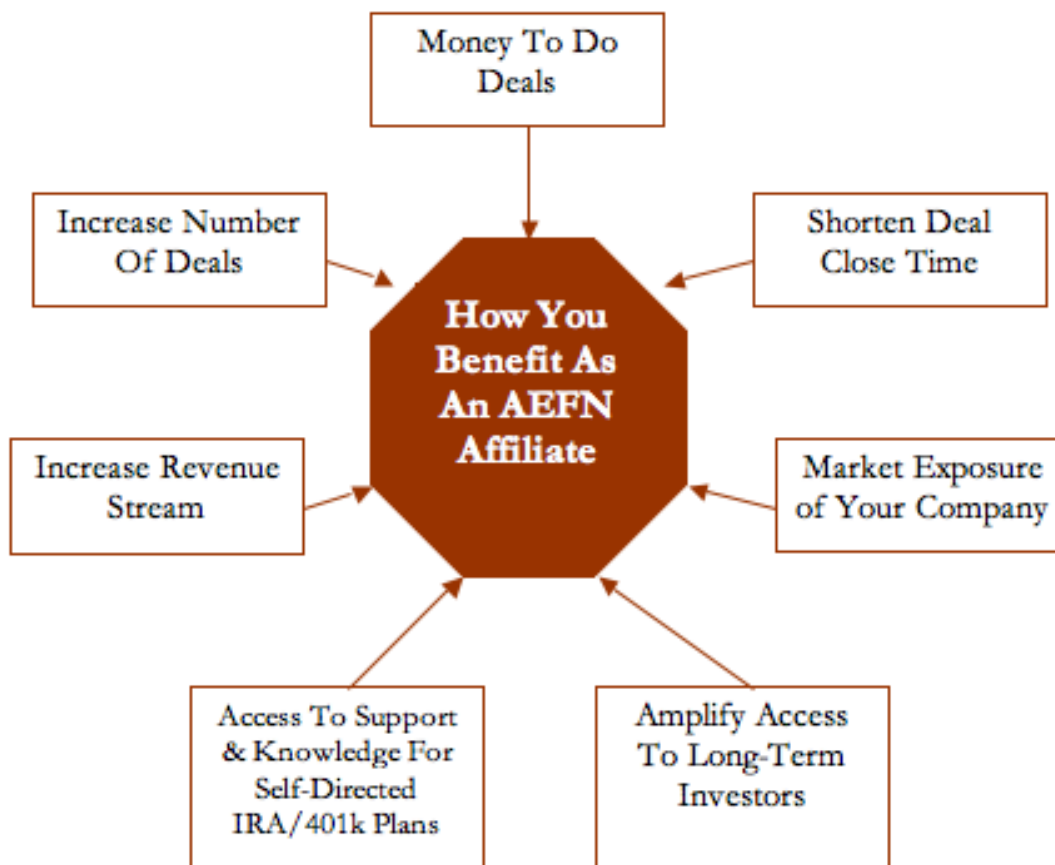


**Ongoing Support** - We provide a variety of ongoing support to our clients to assist them to stay compliant and achieve their self-directed investment goals; we also work closely and support our Affiliates and our Franchisees.

**Proven Sales Methods** - Our competitive edge is our comprehensive market driven sales and operations training.

**Rapid Revenue Generation** - Our self-directed IRA/401k investment plans result in an appealing revenue generation and ongoing access to potential investors.

### BENEFIT WHEEL





## What We Provide Our Affiliates

### INCLUSIVE MARKETING PACKAGE

Our Affiliate Marketing Program package includes our progressive marketing strategies and extensive marketing activities that will attract potential investor clients, create qualified investor leads, and provide current clients the means to invest.

**We provide the following no-fee service to our Affiliates:**

#### **Assigned Professional Marketing / Sales Person**

An AEFN professional is assigned to execute our various marketing activities to potential investors.

#### **Execute Marketing to Potential Investor Contacts**

Conduct Email Campaigns for Self-Directed Products

- List Affiliate company and/or project in the email

Introduce & Promote

- Project(s) of Affiliate company
- Specific self-directed plans to contacts and prospects

Select Group Marketing: Marketing

- Execute campaigns designed and executed specifically for CPA's, Attorneys, Financial Advisors, and clients of AEFN

Garner New Leads & Prospects

- Utilize all AEFN product marketing activities to garner new contacts

Database Management

- Utilizing AEFN CRM system to track and manage leads, prospects, and closed clients

#### **Create Awareness for Your Company & Projects**

Web Link on AEFN web site to Affiliate's company web site

#### **Vet Potential Self-Directed Investor Funders**

We take the time and make the effort to effectively determine if a potential investor has the desire and means to invest



**Setup & Process Self-Directed Investment Entities**

We provide your client's full service processing that is unmatched for accuracy, completeness, and follow-up; this includes legally supervised processing of their self-directed investment entity, and custodial management service to expedite plans and changes and minimize their cost.

**Live Support**

Our Affiliates have a person to talk to. If there's ever a question you can't answer just pick up the phone and call our support line.

**Ongoing Access to Knowledge Support**

We become your go-to advisors on self-directed investment plans

**Access to Education Materials on Self-Directed Investment Plans**

Affiliates have access to our education library of products at [IRATraining.com](http://IRATraining.com)  
There may be a fee for certain items.



## Fee Based Services

You have the option to purchase any of our fee-based self-directed products.

In addition, we offer the following services individually and combinations that can be bundled for cost efficiency:

<p><b>Marketing Tools</b></p> <ul style="list-style-type: none"> <li>○ CRM System</li> <li>○ Emailing Marketing</li> <li>○ Print Media</li> </ul>	<p><b>Legal Entity Setup</b></p> <ul style="list-style-type: none"> <li>○ DBA's</li> <li>○ LLC's</li> <li>○ Corporation's</li> </ul>
<p><b>Financial Plans</b></p> <ul style="list-style-type: none"> <li>○ Investments</li> <li>○ Accounting Service</li> <li>○ Retirement Plans</li> </ul>	<p><b>WEB Services</b></p> <ul style="list-style-type: none"> <li>○ Web Site Template</li> <li>○ Web SEO</li> <li>○ Web Analytics</li> </ul>
<p><b>Public Relations</b></p> <p>Using a variety of proven methods from press releases to event planning, our in-house Public Relations department works directly with you to help promote your funding opportunities.</p>	
<p><b>Alternative Financing Guidance To Expand Your Business</b></p> <p>We can provide you guidance and the business structure for you to use your own retirement funds to expand your current business or start another business. This financing option gives you debt free expansion or start-up, low overhead, tax savings, and allows for a debt-free start-up since no bank loan is required, and no bank loan means no interest payments. Fee based</p>	



## Engage Now

A few simple steps lead you to becoming an AEFN Sales Affiliate:

1. Make Contact With AEFN Business Development Team at **866-683-5228**.

2. Learn about the Affiliate Marketing opportunity:

After a brief introductory discussion, we will send you our Affiliate Marketing Program agreement for your review. We also schedule a telephone appointment with one of our Business Development Directors to answer any questions you may have while reviewing the details of our Affiliate opportunity.

3. Home office visit:

To further your fact-finding effort, you will be invited to visit our home office. The invitation is extended so that Affiliate candidates have an opportunity to meet key management and our business development team, and to learn more about our products, services and support behind the our Affiliate Marketing Program.

4. Due diligence by you and AEFN.

5. Upon final completion and approval of your application, and signing of the Affiliate Agreement you will be welcomed as an AEFN Affiliate.

6. The AEFN Affiliate Marketing Program is incorporated into your business!



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