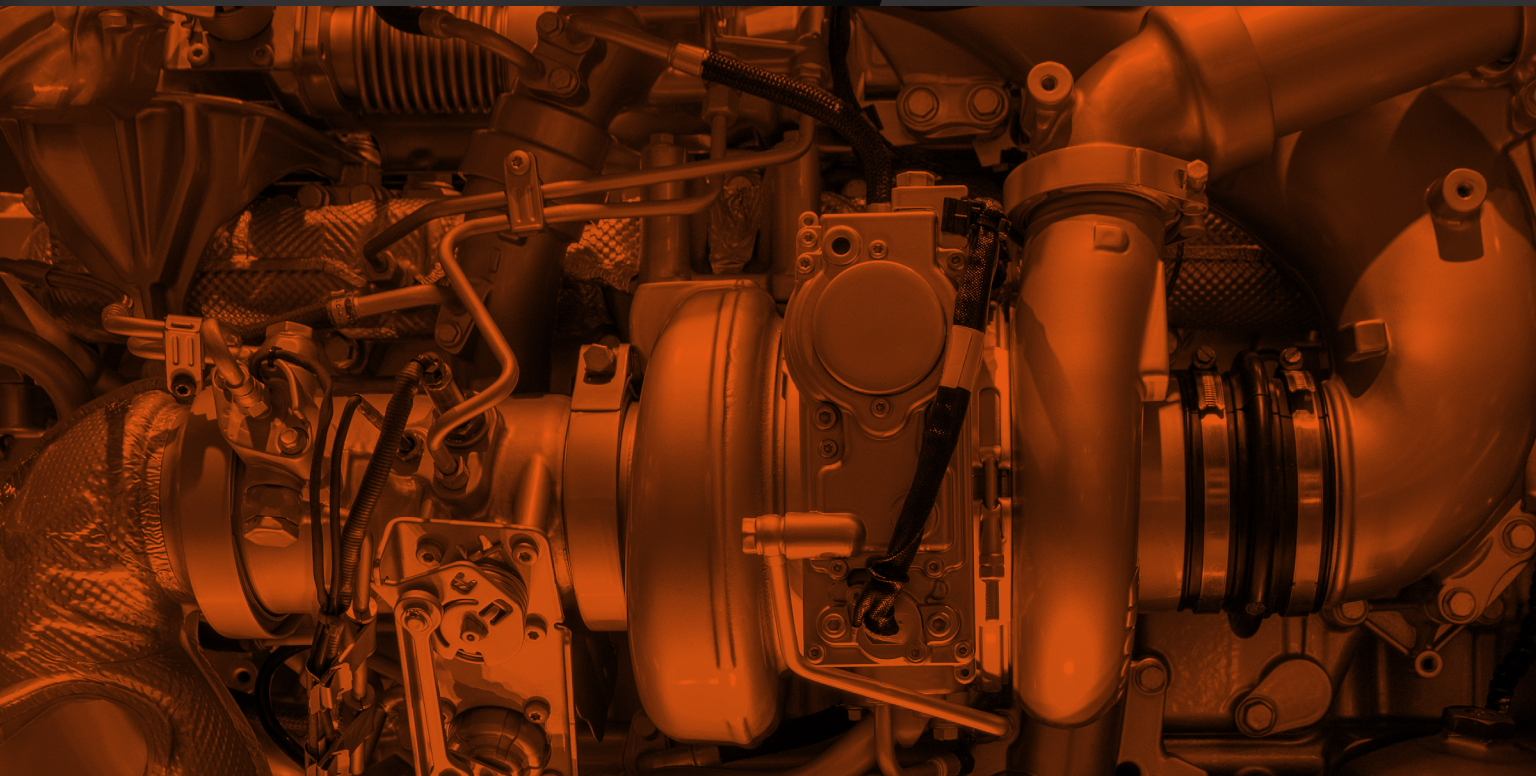


The Art of the Call to Action

Creating Value Through Better Offers,
Better Delivery, and Better Preparation



MAGELLAN
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Building a Stronger CTA

One of the biggest mistakes advisors make when recording television shows is treating the call to action like an afterthought. In reality, the CTA is one of the most important parts of the entire program. You can have a great conversation, strong information, and excellent chemistry on set, but if the audience does not understand what they are supposed to do next or why they should do it, the opportunity is lost.

There are natural and opportune moments throughout every show to introduce micro-gives and calls to action. This includes offers such as books, guides, quizzes, calculators, checklists, and other tools designed to create engagement. At the end of each segment, there should also be a larger, more comprehensive offer designed to prompt the viewer to take action and schedule a meeting.

One misconception advisors often have is the fear of “asking” too much. The reality is the audience already understands what they are watching. They know the show is designed to educate them and introduce them to a financial professional. They expect an offer. They expect an opportunity to learn more or take the next step. When advisors avoid the ask or substitute the primary offer with only a small micro give, they often create more work for themselves on the back end. A guide, calculator,

quiz, or book can absolutely be valuable, but those offers should support the larger objective, not replace it. The goal is to maximize every opportunity every time you come into the studio to record.

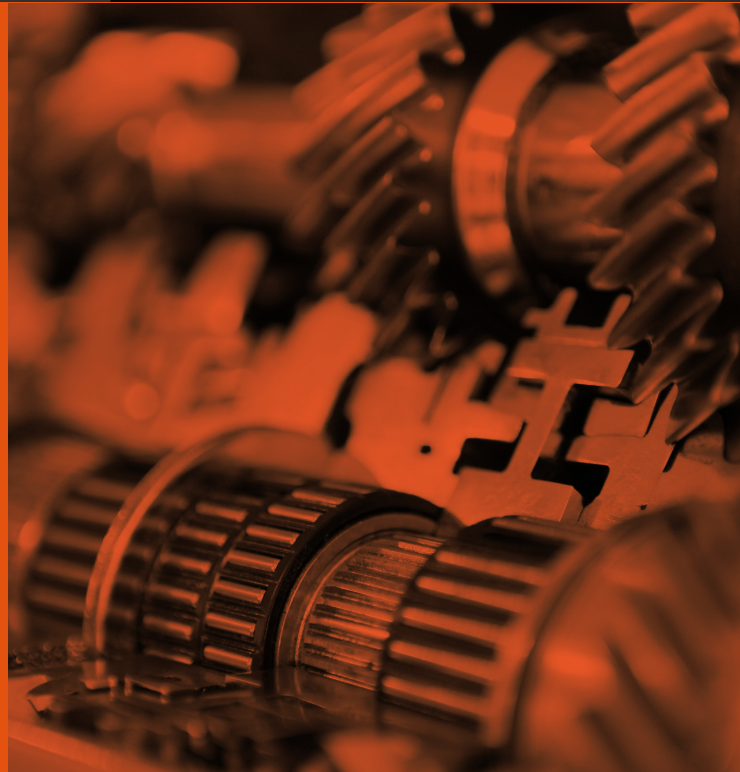
That is why preparation and practice matter so much. The best advisors do not “wing it.” They understand how to position value, transition naturally to the CTA, and make the audience feel they are receiving something meaningful and comprehensive.

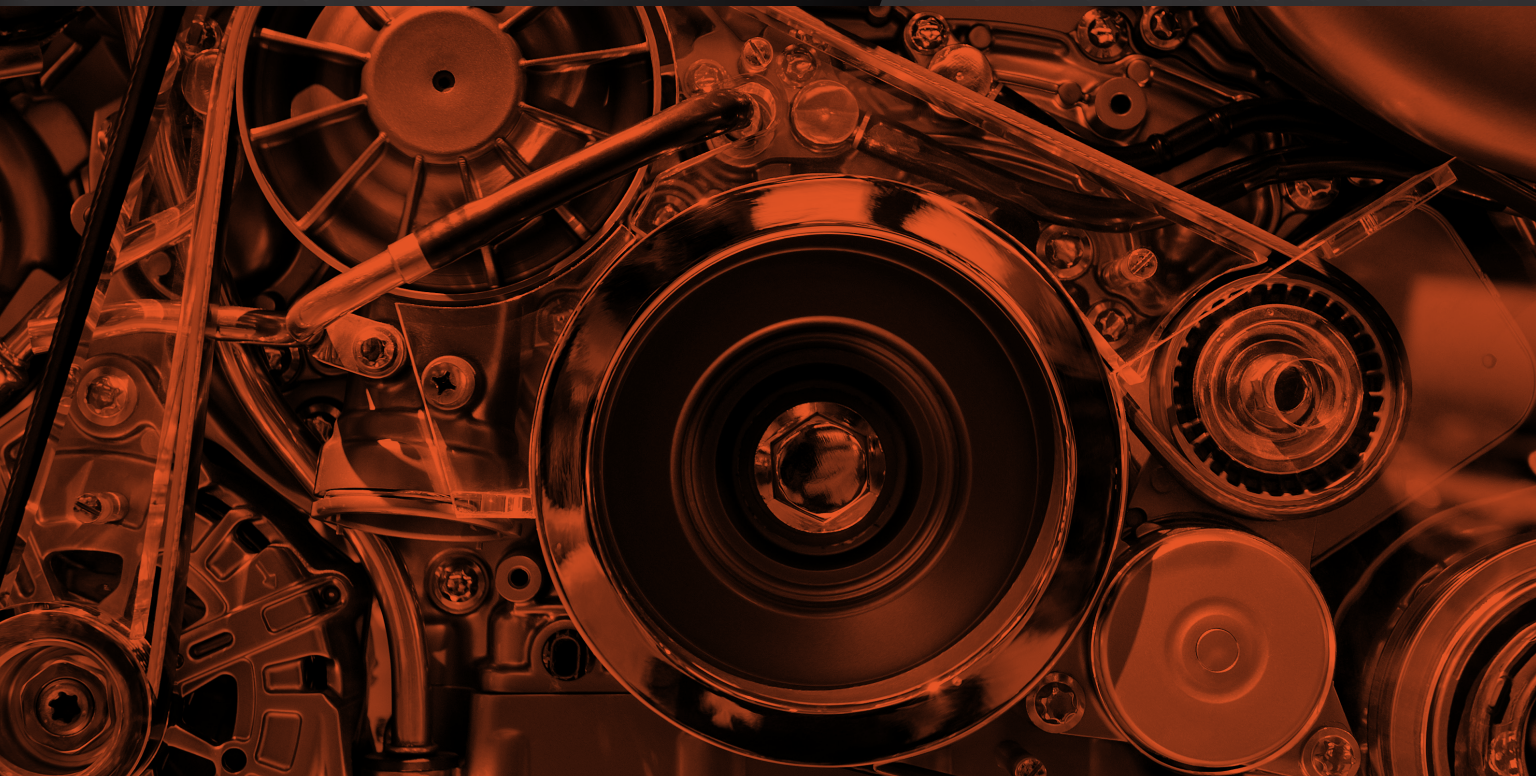
Delivery also matters. Whether the advisor or the host is reading the CTA, it should sound substantial and important. There is a massive difference between saying, “Call now for your complimentary review,” and clearly walking the audience through a written financial plan that evaluates risk, fees, taxes, income, healthcare, and every major area of retirement planning.

One sounds generic. The other sounds valuable, thoughtful, and personalized.

The audience should walk away feeling like they are being offered something meaningful. Something comprehensive. Something worth taking action on.

The purpose of this guide is to help advisors and hosts better understand how to structure, position, deliver, and customize calls to action that create stronger engagement, better responses, and more opportunities from every recorded show.





The Anatomy of a Strong CTA

One of the biggest mistakes financial advisors make during television and radio appearances is assuming the audience understands the value of what they do simply because they themselves live in that world every day.

The reality is that most of our target audience has never retired before. They do not understand the complexities of retirement income planning, tax efficiency, Social Security decisions, healthcare costs, risk management, estate planning, or long-term financial strategy. What may feel obvious or routine to an advisor often feels confusing, overwhelming, and uncertain to the audience. That is exactly why the call to action matters.

A strong CTA does more than simply ask the audience to call a phone number or schedule an appointment. A strong CTA positions the advisor as someone who understands the problems being discussed and has a process designed to help address them. The CTA should feel like the natural conclusion to the segment.

Throughout the show, the advisor and host should spend time discussing problems, concerns, risks, and pain points the audience may be facing. This could include concerns about market volatility, rising taxes, healthcare costs, inflation, Social Security decisions, retirement income, or protecting assets during retirement.

The purpose of the segment is not simply to deliver information. The purpose is to create awareness and emotional connection around problems the audience may already be experiencing or worrying about.

The CTA is where the audience is introduced to a potential solution.

If the segment spends eight minutes discussing taxes in retirement and the CTA simply says, "Call now for a complimentary review," the opportunity is lost. The offer feels generic and disconnected from the conversation that just took place.

Instead, the CTA should directly connect to the concerns discussed during the segment and clearly explain how the advisor plans to address them.

For example:

"We just spent time discussing taxes in retirement. As part of this written financial plan, we are going to take a deep dive into the tax efficiency of your current strategy and determine whether there may be opportunities

worth exploring moving forward.” That feels connected. Relevant. Valuable.

Another common issue arises when a segment approaches its end, and the CTA feels rushed. Advisors and hosts become so focused on the conversation that they suddenly realize there are only 30 seconds remaining. This often leads to weak delivery, rushed wording, poor pacing, and generic offers. A rushed CTA almost always reduces perceived value.

The strongest advisors and hosts understand that the CTA is not an afterthought. It is the most important part of the segment. They prepare for it, rehearse it, and understand how much time it requires and how to transition into it naturally. It should become involuntary... like breathing.

A great CTA should accomplish several things:

- Reinforce the pain points discussed during the segment
- Present a clear and meaningful solution
- Explain the value of the offer
- Help the audience understand what happens next
- Feel personalized and comprehensive
- Sound conversational, not scripted
- Create enough perceived value to motivate action

Most importantly, the audience should leave feeling like they are being offered something substantial. Not a sales pitch or a generic review, something designed specifically around helping them navigate the complexities and uncertainties of retirement.



Micro Gives vs. Major Offers

One of the most important things advisors and hosts must understand before recording a show is that preparation matters. Great calls to action rarely happen by accident. The strongest segments result from planning, timing, repetition, and intentional execution on the front end.

Before recording begins, the advisor, host, and production team should already understand:

- What is the topic of the segment
- What problems or concerns will be discussed
- What emotional pain points may resonate with the audience
- What micro-give naturally aligns with the topic
- What the major offer will be at the end of the segment
- Approximately when the micro-give and CTA will occur

Without preparation, segments often become rushed, disorganized, or disconnected. Advisors get caught up in the conversation, lose track of time, and suddenly find themselves trying to squeeze a major CTA into the final 20 to 30 seconds of the segment. That almost always weakens the offer and reduces response. The structure of the show should be intentional.

In most cases, the micro-give should appear around the halfway point of the segment. This gives the audience enough time to engage with the topic before being presented with a smaller, lower-commitment offer that supports the conversation. The key is alignment.

The micro-give should feel like a natural extension of the topic being discussed. If the segment is focused on taxes in retirement, a tax calculator is a natural fit. If the conversation is centered around market volatility

and risk, a risk quiz or portfolio stress test may make more sense. If the topic is Social Security, then a Social Security calculator or guide becomes relevant. The audience should never feel like the offer appeared randomly.

The wording of the micro-give also matters significantly. One of the biggest mistakes advisors make is minimizing the perceived value of the offer. Even though the micro-give is considered a “smaller” offer internally, it should still sound meaningful and valuable to the audience.

For example, during a segment focused on taxes, the host or advisor may say:
“Hey, we are talking about taxes here, and a lot of people do not realize taxes could end up being one of their greatest expenses in retirement. If you would like to get a better understanding of what the potential tax liability

could be on your qualified retirement assets, simply scan the QR code on your screen and go through our quick calculation. It can help give you a general idea of what your future tax exposure may look like.”

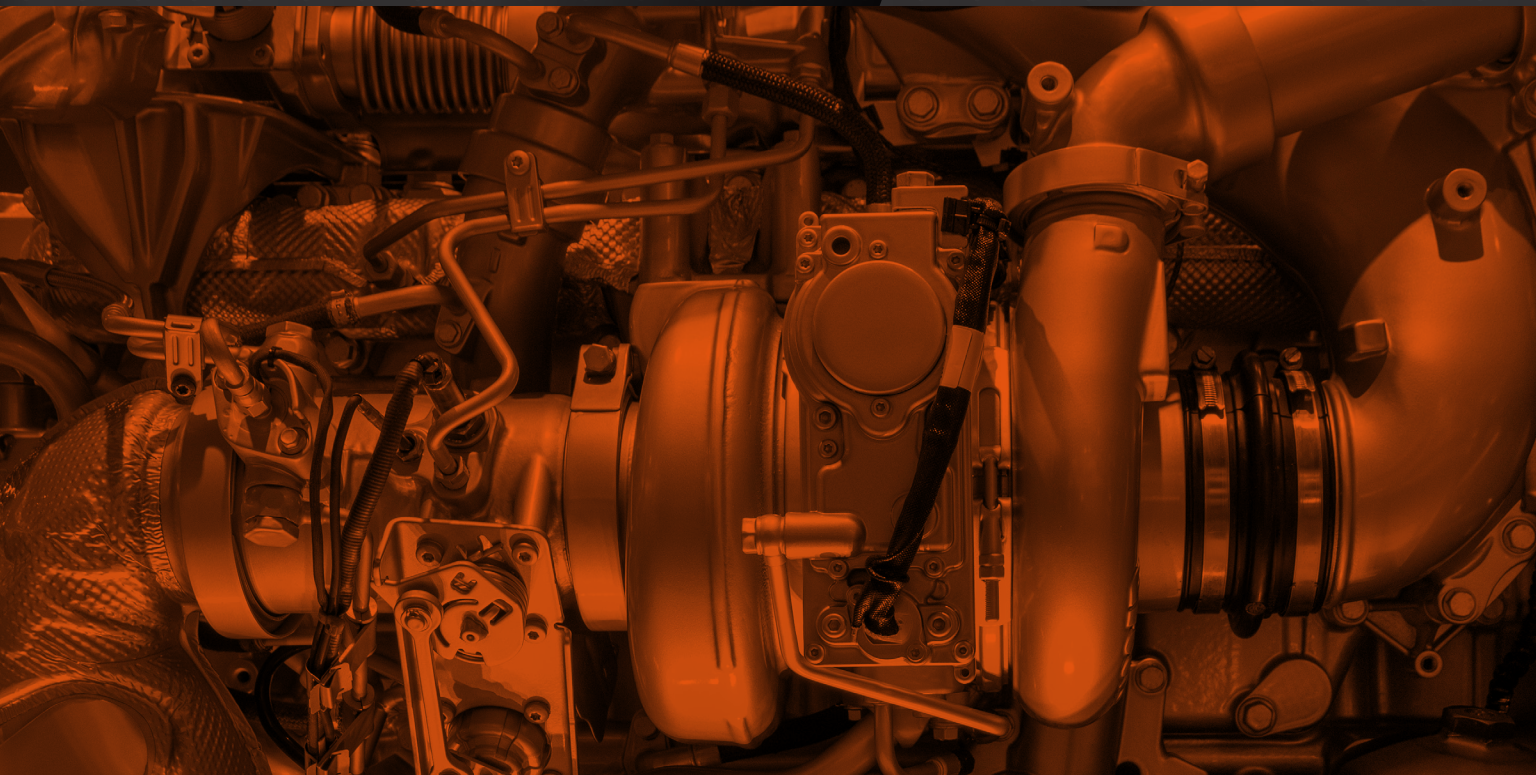
That sounds connected to the conversation. It sounds relevant. Most importantly, it sounds valuable.

Micro-gives serve an important purpose. They create interaction, curiosity, and engagement. They allow the audience to take a small first step without feeling pressured into making a major commitment. However, advisors must also understand that micro gives are not designed to replace the primary offer.

A guide, calculator, quiz, or book can absolutely help generate leads and engagement, but the primary CTA at the end of the segment should still position the audience

toward the larger, more comprehensive solution. What we ultimately want is an appointment. Let’s not create more work than is necessary to get one. Just ask for it!

The end of the segment is where the audience should feel like they are being offered something meaningful and personalized. The micro-give supports the segment, and the CTA monetizes the segment. The strongest shows use both strategically.



Structuring the Segment for Better CTA Performance

The best television and radio segments typically follow a very simple formula:

1. Introduce the topic
2. Explain how the topic relates to the audience
3. Discuss the problems and pain points associated with it
4. Present a solution through the CTA

That structure works because it mirrors how people naturally process problems and decision-making.

Watch your shows. Do you sound relatable, or are you talking over the audience's heads? Some advisors make the mistake of turning the segment into a presentation about themselves. They try to sound intelligent, overly technical, or impressive. The problem is that the audience is not watching to hear how smart the advisor is. They are watching because they have concerns about their own retirement.

The audience does not care how many designations an advisor has, how complex their vocabulary is, or how sophisticated they sound on television. They care about whether the advisor understands their problems and whether there may be a solution that could help them. The most effective advisors simplify complex topics and make them relatable to viewers.

For example, a segment about taxes should not begin with advanced tax code language or technical planning strategies. It should begin with a problem the audience can immediately understand:

"Many retirees do not realize taxes could become one of their largest expenses during retirement."

That immediately creates relevance. From there, the advisor can explain why the issue matters, what problems it may create, and what mistakes people often make. Once the audience emotionally connects with the concern under discussion, the CTA becomes far more powerful because it feels like a logical next step rather than a random sales pitch.

The CTA is the solution to the problem discussed throughout the segment.

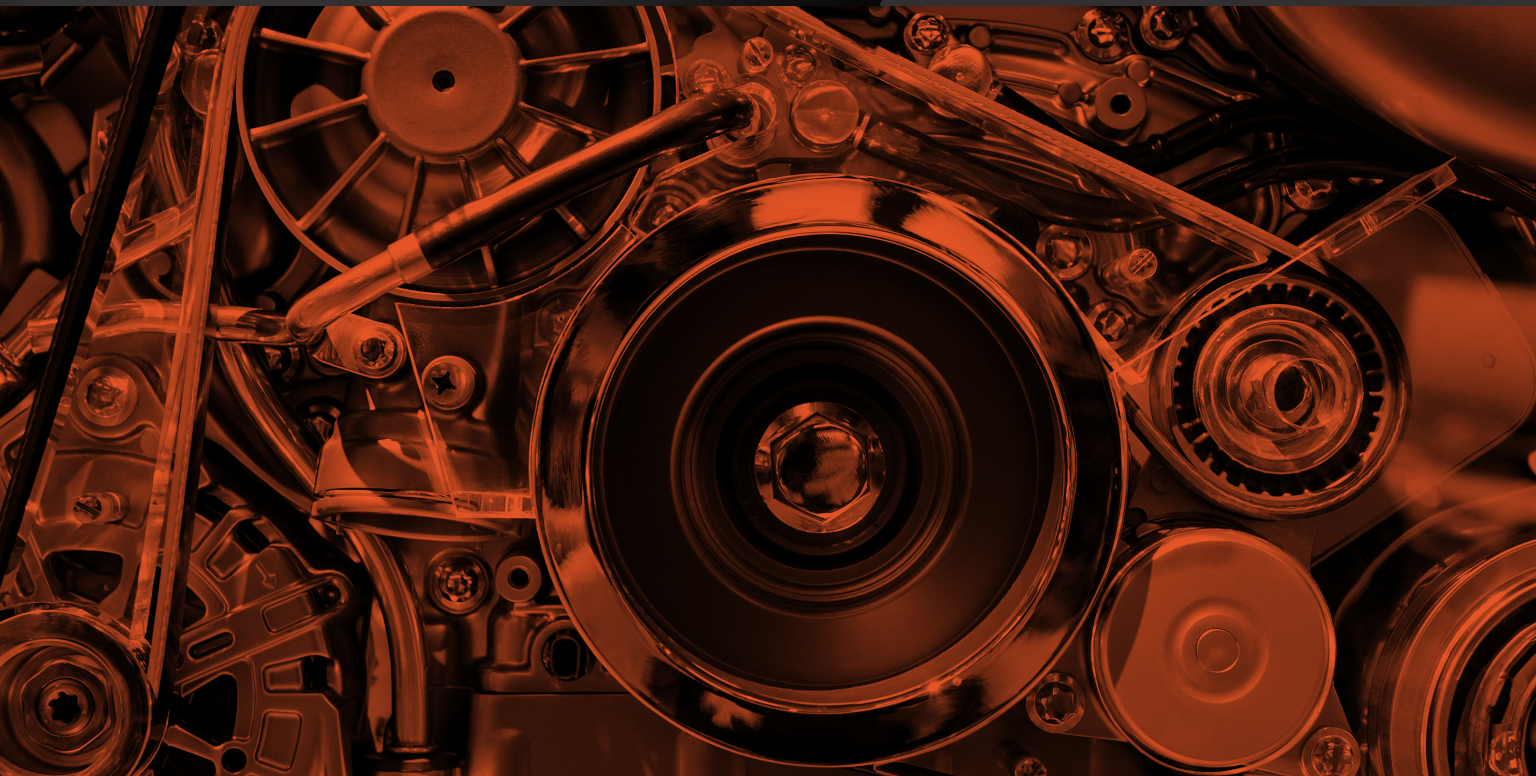
That is why preparation matters so much. Advisors and hosts should understand before filming:

- What topic is being discussed
- What emotional concerns may resonate with viewers
- What micro-give supports the topic
- What the primary CTA will be
- How much time needs to be reserved for delivery

One of the biggest mistakes advisors make is allowing the conversation to run too long. The segment ends quickly, the CTA gets rushed, and the most important part of the segment loses impact.

The strongest advisors understand that the CTA is not separate from the segment. It is the payoff to the segment.

Everything discussed beforehand should naturally lead the audience toward the offer being presented at the end.



Example of a High Value CTA

The following is an example of a comprehensive CTA designed to create perceived value, reinforce the concerns discussed during the segment, and clearly explain the process the audience will go through.

The goal is not simply to “ask for an appointment.” The goal is to make the audience feel like they are being offered something meaningful, personalized, and valuable.

A strong CTA should feel like the natural conclusion to the conversation that just took place during the segment.

CTA:

Today, we are offering our audience a complimentary written financial plan.

Before we put anything together, we will sit down and get to know you. We want to understand what is important to you, your goals, any concerns you may have, and what you want retirement to look like.

First, we will evaluate the amount of risk you are currently taking and determine whether it truly aligns with your comfort level and long-term objectives. Next, we will review the fees you may be paying and determine whether the value you are receiving justifies the cost.

We will take a deep dive into the tax efficiency of your overall plan. Is there actually a strategy in place?

Has anyone addressed how taxes could impact your retirement moving forward? If not, what opportunities may exist to potentially improve your position over time? From there, we will evaluate your retirement income strategy, including Social Security, pensions, investments, and other retirement assets. We will also look at your healthcare picture and how rising healthcare costs could impact your financial future.

At the end of the day, we will review every aspect of your financial life to identify potential gaps, unnecessary risks, missed opportunities, and areas that may warrant more attention.

Once we complete that process, we will develop a written financial plan tailored to your specific goals, needs, and objectives. Not a generic template. Not a one-size-fits-all approach. A plan built specifically for you.

Why This CTA Works

This CTA works because it clearly explains value to the audience. Instead of simply telling the viewer to “call for a complimentary review,” it walks them through a thoughtful process that feels personalized, comprehensive, and important.

Several things are happening throughout this CTA:

- It reinforces the concerns discussed during the segment
- It explains what the audience will actually receive
- It positions the advisor as thorough and detail-oriented
- It creates perceived value around the offer
- It feels personalized instead of generic

- It helps the audience understand what happens next
- It sounds conversational instead of overly scripted

Most importantly, it makes the audience feel as if they are being offered a real process designed to help them navigate retirement, not simply another sales appointment.



Weak CTA vs. Strong CTA

Weak CTA:

"Call now for your complimentary review."

The problem with this type of CTA is that it sounds generic. The audience has no idea what the process looks like, what they are receiving, or why it is valuable.

Strong CTA:

The previous written financial plan example. The difference is perceived value. One sounds like a generic meeting (that they can get anywhere from any financial practice). The other sounds comprehensive, thoughtful, and personalized. That difference matters significantly when it comes to audience engagement and response



Final Thoughts

The advisors and hosts who generate the strongest responses are usually not the ones trying the hardest to sound impressive. They are the ones who connect most effectively with the audience and clearly communicate value. That is why preparation matters so much.

Strong CTAs DO NOT happen by accident. They require practice, coordination, timing, and repetition on the front end. Whether the host or the advisor is delivering the CTA, it should sound substantial, valuable, and important to the audience. The delivery matters just as much as the offer itself.

A rushed, robotic, uncertain, or generic CTA immediately lowers perceived value. The audience can feel when the delivery lacks conviction or preparation. Great advisors rehearse their transitions, understand their timing, and know exactly how they want the CTA to sound before they ever step on set. **Practice matters.**

The best advisors and hosts practice repeatedly so that the CTA feels conversational and natural rather than scripted and forced. They understand where the micro-give will occur, how the segment will transition to the major offer, and how much time is needed to properly deliver the CTA without rushing.

Another important point is avoiding CTAs that focus too heavily on internal processes inside the practice. Consumers do not know your internal systems, terminology, workflows, or processes. More importantly, they do not care. What may sound innovative or exciting internally often means very little to the audience because they lack the context to understand why it matters. Tell them about your process when they come in to see you.

The audience is not asking:
“What is this advisor’s internal process?”

They are asking:
“How does this help me?”

That distinction is critical.

The CTA should always focus on the value the audience receives, the problems being addressed, and the outcomes the process is designed to help solve. The more relatable and audience-focused the CTA becomes, the more effective it will be.

At the end of the day, the goal is not to impress the audience. The goal is to connect with the audience and create an opportunity.

Pro Tip

Thoroughly think through your CTA before you ever step on set. Write it down. Practice it repeatedly. Refine the wording. Refine the delivery. Make sure it sounds valuable, substantial, and natural.

Most importantly, run it by people outside of our industry. Ask normal people. Ask people who are approaching retirement. Ask people who could realistically become clients. Their opinion matters far more than the opinion of another financial advisor.

One of the biggest challenges in our industry is that we hear the same language, phrases, and concepts every single day. Over time, advisors come to believe that everything sounds good simply because it sounds familiar.

The audience does not think like we do. What sounds intelligent or impressive inside the industry may sound confusing, generic, overly technical, or uninteresting to the average viewer.

At the end of the day, it does not matter what financial advisors think about the CTA.

What matters is what the audience thinks.



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