

Email 1

Subject: Struggling with AI? Start here

Preheader: A simple guide to help you unlock AI's potential today.

Body:

Hey [NAME] —

Not sure if you've messed around with AI much yet, but I know it can feel a bit overwhelming at first. I've been there.

My team put together this short guide—it's just 2 pages—but it's super helpful if you're trying to figure out how to actually use AI without going down a rabbit hole. Thought it might be useful.

Here's the link: [Download it here](#).

Let me know if you give it a try.

— [Your Name]

Email 2

Subject: Boost your team's efficiency in just 2 minutes

Preheader: Practical tips to make AI work for your business.

Body:

Hey [NAME] —

Have you thought about how AI could give your team an extra boost?

I came across this quick [2-minute podcast clip](#) from Geoff Woods, and it's packed with some great ideas. He shares 4 simple ways to help your team get more out of their day without overcomplicating things.

It's worth checking out, and I thought you might find it useful too.

[Here's the link](#) to listen now.

Hit me back if you end up trying any of these tips—I'd love to hear what you think.

Best,

[Your Name]

Geoff Woods is the Founder of AI Leadership, where he empowers leaders to harness AI, escape operational overwhelm, and think strategically to accelerate growth.

Email 3

Subject: Unlock AI's potential to transform your business

Preheader: Gain clarity on how AI can reshape your business.

Body:

Hey [NAME] —

I know AI can feel a little overwhelming sometimes, but it doesn't have to be.

Geoff Woods just shared this visual that simplifies everything. It's clear, actionable, and gives a straightforward path for how you can actually start using AI in your business.

Thought this might be something you'd find helpful.

[Visual Below]

3 ways AI can bring value



MAKING PEOPLE
MORE PRODUCTIVE



MAKING OPERATIONS
MORE EFFICIENT



MAKING PRODUCTS &
SERVICES MORE VALUABLE

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Would love to hear what you think once you check it out.

Best,

[Your Name]

Email 4

Subject: Winning with AI: Secrets from a top advisor

Preheader: Discover how AI is driving big results for advisors like you.

Body:

Hey [NAME] —

[ADVISOR NAME], one of the top advisors out there, has been sharing how he's using AI to completely change the way he works. It's pretty inspiring to see what's possible with the right strategies.

Here's what he's been doing that really stood out to me:

- Finding ideal clients—high-net-worth prospects with over \$1M in their RIA.
- Running smarter campaigns with targeted Facebook and Instagram ads.
- Creating content that actually gets engagement.
- Using AI insights to continually fine-tune his campaigns and drive better results.

The cool thing? [ADVISOR] is going to be at our next event, **AI Driven Advisor**, to share exactly how he's doing this.

Thinking about coming? Just shoot me a quick reply, and I'll make sure you're all set.

Catch you soon,

[Your Name]

Email 5

Subject: 40% better results? AI holds the key

Preheader: Discover how AI users achieved results faster.

Body:

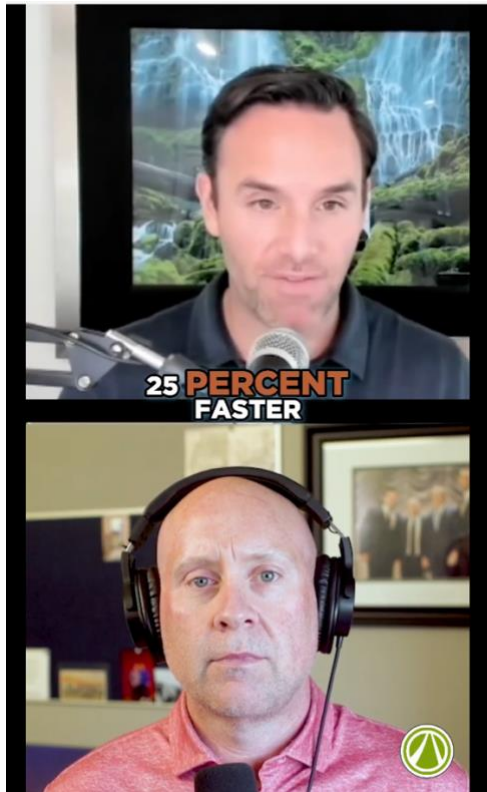
Hey [NAME] —

What would a 40% boost in your results mean for you?

Geoff Woods recently mentioned a study from Boston Consulting Group and Harvard that caught my attention.

It showed professionals using AI improved their work quality by 40% and completed tasks 25% faster. Pretty wild, right?

[Thumbnail Placeholder for Podcast Clip]



The best part? Geoff's going to share even more strategies at our upcoming event.

Are you thinking about attending? Just reply, and I'll make sure you're good to go!

Best,

[Your Name]

Email 6

Subject: Free guide: Amplify your success with AI

Preheader: Learn how [ADVISOR NAME] is using AI to thrive and get your free guide.

Body:

[NAME] –

AI isn't here to replace what you already do so well. It's here to amplify your expertise.

[ADVISOR NAME], one of the top advisors out there, has been using tools like Catchlight AI to streamline outreach and Jump.AI to transform conversations into actionable tasks and notes with secure AI. The impact has been huge.

The good news? You can do the same. I wanted to share a [free guide](#) with you that's packed with AI Business Use Case Prompts.

Think actionable strategies to help boost your business and take things to the next level.

Button: [\[Download Free Guide\]](#)

[ADVISOR] will also be sharing more insights at our upcoming event.

Interested in attending? Just hit reply and I'll make sure you're set up.

Talk soon,

[Your Name]

Email 7

Subject: Meet the AI experts transforming financial advising

Preheader: Hear from AI's top industry experts.

Body:

Hey [NAME],

I wanted to make sure you know about an incredible opportunity coming up.

At our panel, “**Meet the AI Experts Transforming Financial Advising**,” you'll get to hear directly from the leaders behind game-changing tools like Zocks, Catchlight, and Snappy Kraken.

This is your chance to see how other advisors are using these tools to save time, grow their business, and make a bigger impact.

Here's a sneak peek at the tools from the companies our speakers represent to transform your practice:

- **Catchlight AI:** Smarter strategies to revolutionize your outreach.
- **Zocks:** Automations for client notes, emails, and profiles to save 8+ hours a week.
- **Snappy Kraken:** Marketing campaigns that get real results.

You'll also hear firsthand from two of AE's top advisors, [ADVISOR NAME] and [ADVISOR NAME], on how they're achieving amazing results with tools like these.

This panel is part of our **AI Driven Advisor** event, July 30–August 1. We're not recording this session, so you really don't want to miss it.

[Register now to secure your spot.](#)

I'd love to see you there! Have questions? Just hit reply, and I'll make sure you're all set.

Best,

[Your Name]

P.S. Don't wait too long to grab your seat! The event is filling up fast.

Email 8

Subject: How AI automation saved \$180k—learn their strategy

Preheader: See the strategies behind these results.

Body:

Hi [NAME] —

I wanted to share a story that caught my attention. One advisor saved \$180k using AI automation to streamline processes and cut inefficiencies.

\$180k. Curious how they pulled it off?

Take a quick look at [this webinar clip](#) to see the exact strategies they used to save time, cut costs, and scale smarter.

I know these kinds of results are possible for you too. Seats for the **AI Driven Advisor event, July 30–August 1**, are almost full. Secure yours now so you don't miss out!

[Reserve your spot.](#)

Talk soon,

[Your Name]

Email 9

Subject: Your guide to scaling smarter with AI

Preheader: Actionable AI strategies for advisors like you.

Body:

Hey [NAME] —

We're less than a month away from the big event. Want to see how AI can transform your practice?

Our exclusive whitepaper, "**The Financial Advisors' Guide to AI**," breaks down top strategies to help you scale smarter.

At the event, you'll also hear from two of AE's top advisors, [ADVISOR NAME] and [ADVISOR NAME]. They'll share how they're using AI to amplify their success and get real results.

Get your guide and [register now](#).

Event Details:

- **When:** Wed, July 30 - August 1
- **Where:** [CITY, ST], Headquarters

Seats are limited, so don't wait to grab yours!

– [NAME]

Email 10

Subject: Lead with AI and set the pace for success

Preheader: Your team's growth starts with your leadership.

Body:

Hey [NAME] —

You know the saying, “*Speed of the leader, speed of the pack*”? It's one I think about a lot.

Your team can only rise to the level you lead them to. If you're ready to set the pace and take things to the next level, now's the time.

AI isn't just about technology—it's about leadership. We put together [a quick clip](#) breaking down how AI can transform the way you lead your team, making growth inevitable and success scalable.

Want to go even deeper? **Join us at the AI Driven Advisor event this July 30–August 1 in [CITY, ST].**

Seats are limited, so don't wait too long to make your move.

[Secure your spot to lead with confidence.](#)

Talk soon,

[Your Name]

Email 11

Subject: Don't miss out—your final chance to register

Preheader: Unlock strategies to scale smarter with Geoff Woods.

Body:

Hi [NAME] —

This is it. Your last chance to claim your spot at the AI Driven Advisor event.

Geoff Woods, our headline speaker, has an important message waiting for you in this [short video](#). It's just a glimpse of how this event can redefine your practice—but only if you're there.

This is more than an event. It's your opportunity to unlock game-changing strategies, forge valuable connections, and lead your team to new heights.

The clock is ticking, and once the doors close, they're closed. Don't miss the insights that could transform how you lead and scale.

[This is your last chance—register now to join us.](#)

Event Details:

- **When:** Wed, July 30 - August 1
- **Where:** [CITY, ST] – Headquarters

This is your moment. Click below to secure your spot now.

[Register now to lead forward.](#)

Talk soon,

[Your Name]