Inside: 10 Rules For Successful
Marketing in Financial Services

The financial industry is one of the most difficult industries to create effective marketing in. This "Swipe File" and report will highlight why it is so difficult and provide you with proven ways to create successful marketing... all by studying the successes of the past.

The ULTIMATE
Marketing
Swipe File: 122
Winning Ads &
Titles from
Direct Response
Geniuses

By: Mark Mersman



### Are You Following *These* Rules for Success?

This swipe file contains some of the most effective marketing ever done on this planet. It contains marketing copy that has generated MILLIONS and MILLIONS of dollars in sales and it may be one of the most lucrative things anybody has ever given you (should you choose to use it correctly). Save this to your desktop. Print it out and keep it near you ANY time you are looking for inspiration when creating marketing. Why do I say this? Well...

#### I have a confession to make.

My name is Mark Mersman. I'm the Chief Marketing Officer at USA Financial... and I'm a cheater. But I cheat for the right reasons. I cheat so our advisors can win. Advisors just like you.

#### "If you're not cheating, you're not trying hard enough."

I always got a kick out of that quote, and I use it quite frequently (especially when I'm playing a friendly game of cards). But I cheat in an ethical way.... by studying the best practices of the world's most effective marketers. If you aren't doing the same, you're costing yourself a fortune. **You should be a cheater, too.** Let's face some facts... you are **NOT** in the financial services business. Yes... that may be how you get paid... but you are NOT in the financial services business.

<u>You are in the MARKETING business</u>... First and Foremost. Period. End of Story. If you don't embrace this fact, you don't stand a chance of achieving the levels of success you desire.

Why do virtually all broker-dealers, RIAs, and insurance firms not get this? They leave you out on an island to create your own marketing... and then once you finally do take the time to create something, they neuter any chance it has of being effective with their outrageous compliance restrictions! Sound familiar?

I'm not saying you shouldn't be compliant. In fact, I'm saying the EXACT opposite. You MUST have compliant marketing in our industry just as much as you MUST have effective marketing. The sad reality is that most advisors are missing the boat on this. Most insurance marketing organizations or mail houses don't know the first thing about what it takes to be compliant. And most broker-dealers or investment firms don't know the first thing about effective marketing. But guess what...

It is possible to have **effective** AND **compliant** marketing!

Why should you believe me? After all, I told you I'm a cheater...

#### Reason #1-

We own and operate an independent broker/dealer and two SEC Registered Investment Advisors. We have three attorneys and a team of individuals under our roof making sure we are compliant. Every piece of marketing we create for advisors MUST be compliant.

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#### Reason # 2-

We've been doing direct response marketing for over 15 years. Since the year 2000, we've spent over \$12 million on printing and postage for direct response marketing specifically for financial advisors.

Let that sink in...

We've spent over \$12 Million on direct response marketing in the financial services marketplace since the year 2000.

We've sent over 40,000,000 pieces of mail over that time frame.

Let me restate that... That's FORTY MILLION pieces of mail.

EVERY single one of those pieces of mail was specifically designed to get a direct response from the consumer – the very consumer to whom you are trying to market your financial solutions.

*Imagine* how much you would learn if you sent more than 200,000 pieces of mail EVERY month focused on one thing – to get someone motivated to take action about a financial solution. *Imagine* how much of an advantage that would give you over just "guessing" what to mail.

This leads us to the first rule for success...

### Rule #1 - Energize your prospect.

**You can do this by using one powerful word.** Imagine making one small change to your direct mail piece or the copy on your website that will immediately get your prospect to take the action you desire.

How do you feel when I ask you to imagine this kind of success in your own business? You may feel energized and ready to start planning a new campaign or website tweak. If nothing else, you want to keep reading to see if this report is as good as I suggest.

Now imagine stirring that same level of excitement in your prospective clients... simply by putting their own imaginations to work.

What's the most persuasive word in your arsenal?

You guessed it... Imagine.

Why is it so persuasive? Because it taps into your customers' deepest desires, no matter what they are. How does it work? When you ask people to imagine something, it helps them engage their imaginations. Go

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figure, right? Until then, they were simply reading your words. By prompting them to imagine, you make it personal. Now they see themselves enjoying the benefits of whatever it is you are introducing.

And that is what it takes to get your prospects to move and take action. People are emotional creatures, and by tapping into the hopes and dreams they already hold dear, you trigger a deep desire for any product or solution that can give it to them.

Here is one sample ad that forces the reader to exercise their brain... and it's all because of one little word. (There are a lot of things wrong with this ad, but the message is undeniably compelling).



### Rule # 2 - Engage your prospect.

I told you I was a cheater, right? I cheated to get you this far by "rephrasing" ad copy from over 80 years ago. The ad below was written by Max Sackheim. **This direct response ad raked in new customers for OVER FOUR DECADES!** 



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Why was this ad so wildly successful? It's the power of ONE word: "these."

Did you notice the title at the top of this Swipe File Report? "Are you following these rules for success?"

By itself, the word "these" is harmless. But if you couple it with something compelling that your audience is curious about... they can't help but read further to find out if they are making "those" mistakes or following "those" rules for success. Naturally, it begs the question... "what mistakes?" Or "what rules?"

There's a lot to learn from the successful copywriters of yesterday. When this particular ad stopped pulling well, he simply made subtle changes...



### Rule #3 - Remember that your prospects need help

We're in the financial services business, right? Do you know what those with a high net worth have on their night stands for reading material? It's not *People* magazine. They have books that will educate them. We are all in need of help. We all want to IMPROVE. And the only way to improve is to learn HOW TO improve (no matter what we need help in). The next ad I'll share is from a copywriter by the name of Eugene Schwartz. If there's a Mt. Rushmore of copywriters from yesteryear, he's on it.

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Obviously, he's not the only one using the words "How to" in his headline... Here are some other effective examples:



one or fron to conduct in public speaking. But seen men. They wasted





REQUEST FOR SOCIAL SICURITY ---INT HUMB. Please sen-Phones send-me flow to With Printed and Influence People. I will pay postessit only \$1.00 plou to New York Sales Tox and four casts passages. It is indicated that I may rood it for 5 cbys and notion in for reduced if 2 them send that it does not in every way live up to the closure made for it.

#### How to collect from Social Security at any age!



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Make check payable to	THE GOOD NE 1818 Whipple A	

SHIPPING LABEL		
ADDRESS		
CITY		
STATE	710 '	

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### Rule # 4 – Incite curiosity

I know what you're thinking... you're probably saying to yourself... "None of these successful ads are from the financial services profession." Until now. The ad below is from the 1940's. It was written by Louis Engel. It is ultra-dense copy, and was one of the most successful financial services ads EVER written. This is the ad that led to the cataclysmic growth of Merrill Lynch, raking in well over 3 MILLION leads during its tenure. But why? The first is that it incites curiosity AND defines its niche in one headline.



#### Rule # 5 – Address Their Skepticism

This ad also did another thing VERY well. It addressed reader skepticism head-on. The subtitles are genius... "Some plain talk about a simple business that often sounds complicated" and "Why we are publishing this information."

#### Rule # 6 – Write to ONE Reader at a time

This rule is extremely important. Remember, exactly ONE reader will read your copy at a time. Many novice copywriters will try to write to their entire audience at once. Yes, you will have more than one reader at any given time... but always speak directly to the individual reader. Make no mistake, the most important part of any marketing piece is the headline. The job of the headline is to get the prospect to read the first sentence, which makes the first sentence the second most important part of any marketing piece. This is where you must remember rule # 6. Here's an example of a powerful first sentence that speaks to ONE reader at a time:

"I don't know how you feel about having a reliable and predictable income stream in retirement, but to me, that's what defines confidence in retirement."

It's honest. It's direct, and it is empathetic. You're not telling somebody how they should feel, but you tell them

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MEDIA USA Financial PLUG-N-RUN Cross-Platform how the benefits of what you are about to talk about make YOU feel. This sets you apart from the competition immediately.

### Rule #7 – Ugly is better than pretty

Are there exceptions to this rule? Absolutely. But when it comes to direct response copywriting, there aren't many. If I had a nickel for every advisor who criticized the aesthetic beauty of our marketing, I'd be a rich man. Most advisors think they need a "pretty" postcard or wedding style invite. But if you look at the majority of the most successful direct response ads of all time, you'll notice one glaring thing --- they are UGLY. They could have been designed and laid out to be more aesthetically pleasing, and they surely could have had nice pretty pictures... after all, a picture is worth a thousand words, right? The trouble is that you don't control what words that picture paints! And in copywriting, you don't want to give up the control of the most powerful tool you have... WORDS. Carefully chosen words! Here are some examples of more successful ads... pay attention... if there are pictures, the pictures are used deliberately for only one reason – to support the copy on the page.



### They Laughed When I Sat Down At the Piano But When I Started to Play!



SECURITIES

# How to create financial advertising that sells

by Ogilvy& Mather







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Marboro Book Shop 144 West 57th Street New York, New York 16

### Rule #8 – Don't be afraid to use checklists/numbers

In the financial services industry, this is a rule you will want to pay close attention to. The use of numbers and checklists in your headlines can be extremely powerful. Take a look at the ad below:

## Seven Deadly Advertising Mistakes

HAVE YOU BEEN BOILING EGGS IN THE WRONG POT? (and can it really matter? See page

Maxwell Sackheim & Co., Inc.

What makes this ad so compelling? The answer is simple. You are inclined to want to see if you are making any of the SEVEN mistakes mentioned. Think about the difference between these two "financial" ad titles:

#### Title One:

Financial Mistakes to Avoid

me \$8.95 plus shipping.

SAVE. Check box and enclose \$8.95 per copy
Publisher then pays shipping.

CHARGE MY MASTER CHARGE.

#### Title Two:

7 Hidden Mistakes to Avoid With Your Finances That Cost Many Baby **Boomers Thousands** 

Notice a difference?

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### Rule #9 - Don't Start with a Blank Page

Most financial professionals are NOT good at writing copy. Writing compelling copy is not easy. The absolute BEST way to write copy that sells is to borrow from the best. That's the reason I've provided you with this SWIPE file. Keep it handy and with you as a reference so you are always able to leverage it the next time it is time for you to write your next newsletter, seminar, marketing piece, or newspaper article.

My goal with this was to help you so you could avoid the "deer in the headlights" feeling the next time you had to create unique content.

On the pages that follow, I'll share with you some of the most successful ads and headlines of all-time. Guard this list closely. Print it out. Store it in a safe place.

### Rule # 10 – If You Can't Do It... Find Somebody Who Can.

If you are looking for a broker/dealer, FMO/IMO, RIA and/or money manager that can help you create compelling and turn-key marketing systems, we'd love to share with you more about what we do.

If you qualify, we'll gladly invite you up to spend a day with us to find out how we've blazed a path in the financial services industry unlike any other firm in existence... one that seeks to empower advisors with turn-key, compelling, and COMPLIANT marketing.

### Call us today at 888.444.0125

Happy Marketing,

Mark R. Mersman

Chief Marketing Officer USA Financial

P.S. To have a qualifying discussion and arrange/reserve for your visit to a <u>Discovery Day</u>, simply call to speak with one of our Business Development VPs at **888.444.0125 ext. 1**.

#### **Discovery Day Notes:**

As with everything at USA Financial, you will be treated with the professionalism you've earned. Your flights will be booked & paid compliments of USA Financial. You will stay at a Five-Star Preferred & Diamond Award Winning Hotel compliments of USA Financial. You will eat at a Top-Knife & Diners' Choice Award Winning Steakhouse compliments of USA Financial. You will be our guest in Grand Rapids, named Lonely Planet's Best in Travel 2014, #1 Destination. And most importantly, you will experience USA Financial from "Behind the Scenes" and get all "The Real Stuff."

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# 100 of the Most Successful Advertising Headlines of All Time (In No Particular Order)

- 1. THE SECRET OF MAKING PEOPLE LIKE YOU
- 2. A LITTLE MISTAKE THAT COST A FARMER \$3,000 A YEAR
- 3. ADVICE TO WIVES WHOSE HUSBANDS DON'T SAVE MONEY BY A WIFE
- 4. THE CHILD WHO WON THE HEARTS OF ALL
- **5. ARE YOU EVER TONGUE-TIED AT A PARTY?**
- 6. HOW A NEW DISCOVERY MADE A PLAIN GIRL BEAUTIFUL
- 7. HOW TO WIN FRIENDS AND INFLUENCE PEOPLE
- 8. THE LAST 2 HOURS ARE THE LONGEST AND THOSE ARE THE 2 HOURS YOU SAVE
- 9. WHO ELSE WANTS A SCREEN STAR FIGURE?
- 10. DO YOU MAKE THESE MISTAKES IN ENGLISH?
- 11. WHY SOME FOODS "EXPLODE" IN YOUR STOMACH
- 12. HANDS THAT LOOK LOVELIER IN 24 HOURS OR YOUR MONEY BACK
- 13. YOU CAN LAUGH AT MONEY WORRIES IF YOU FOLLOW THIS SIMPLE PLAN
- 14. WHY SOME PEOPLE ALMOST ALWAYS MAKE MONEY IN THE STOCK MARKET
- 15. WHEN DOCTORS "FEEL ROTTEN" THIS IS WHAT THEY DO
- 16. IT SEEMS INCREDIBLE THAT YOU CAN OFFER THESE SIGNED ORIGINAL ETCHINGS FOR ONLY \$5 EACH
- 17. FIVE FAMILIAR SKIN TROUBLES WHICH DO YOU WANT TO OVERCOME?
- 18. WHICH OF THESE \$2.50 TO \$5 BEST SELLERS DO YOU WANT FOR ONLY \$1

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#### EACH?

- 19. WHO EVER HEARD OF A WOMAN LOSING WEIGHT AND ENJOYING 3 DELICIOUS MEALS AT THE SAME TIME?
- 20. HOW I IMPROVED MY MEMORY IN ONE EVENING
- 21. DISCOVER THE FORTUNE THAT LIES HIDDEN IN YOUR SALARY
- 22. DOCTORS PROVE 2 OUT OF 3 WOMEN CAN HAVE MORE BEAUTIFUL SKIN IN 14 DAYS
- 23. HOW I MADE A FORTUNE WITH A "FOOL IDEA"
- 24. HOW OFTEN DO YOU HEAR YOURSELF SAYING: "NO, I HAVEN'T READ IT: I'VE BEEN MEANING TO!"
- 25. THOUSANDS HAVE THIS PRICELESS GIFT BUT NEVER DISCOVER IT!
- 26. WHOSE FAULT WHEN CHILDREN DISOBEY?
- 27. HOW A "FOOL STUNT" MADE ME A STAR SALESMAN
- 28. HAVE YOU THESE SYMPTOMS OF NERVE EXHAUSTION?
- 29. GUARANTEED TO GO THROUGH ICE, MUD OR SNOW OR WE PAY THE TOW!
- 30. HAVE YOU A "WORRY" STOCK?
- 31. HOW A NEW KIND OF CLAY IMPROVED MY COMPLEXION IN 30 MINUTES
- 32. 161 NEW WAYS TO A MAN'S HEART IN THIS FASCINATING BOOK FOR COOKS
- 33. PROFITS THAT LIE HIDDEN IN YOUR FARM
- 34. IS THE LIFE OF A CHILD WORTH \$1 TO YOU?
- 35. EVERYWHERE WOMEN ARE RAVING ABOUT THIS AMAZING NEW SHAMPOO!
- 36. DO YOU DO ANY OF THESE TEN EMBARRASSING THINGS?
- 37. SIX TYPES OF INVESTORS WHICH GROUP ARE YOU IN?

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- 38. HOW TO TAKE OUT STAINS...USE (PRODUCT NAME) AND FOLLOW THESE EASY DIRECTIONS
- 39. TODAY...ADD \$10,000 TO YOUR ESTATE FOR THE PRICE OF A NEW HAT
- 40. DOES YOUR CHILD EVER EMBARRASS YOU?
- 41. IS YOUR HOME PICTURE-POOR?
- 42. HOW TO GIVE YOUR CHILDREN EXTRA IRON THESE 3 DELICIOUS WAYS
- 43. TO PEOPLE WHO WANT TO WRITE BUT CAN'T GET STARTED
- 44. THIS ALMOST-MAGICAL LAMP LIGHTS HIGHWAY TURNS BEFORE YOU MAKE THEM
- 45. THE CRIMES WE COMMIT AGAINST OUR STOMACHS
- 46. THE MAN WITH THE "GRASSHOPPER MIND"
- 47. THEY LAUGHED WHEN I SAT DOWN AT THE PIANO BUT WHEN I STARTED TO PLAY!
- 48. THROW AWAY YOUR OARS!
- 49. HOW TO DO WONDERS WITH A LITTLE LAND!
- 50. WHO ELSE WANTS LIGHTER CAKE IN HALF THE MIXING TIME?
- 51. LITTLE LEAKS THAT KEEP MEN POOR
- 52. PIERCED BY 301 NAILS....RETAINS FULL AIR PRESSURE
- 53. NO MORE BACKBREAKING GARDEN CHORES FOR ME YET OURS IS NOW THE SHOW-PLACE OF THE NEIGHBORHOOD!
- 54. OFTEN A BRIDESMAID, NEVER A BRIDE
- 55. HOW MUCH IS "WORKER TENSION" COSTING YOUR COMPANY?
- 56. TO MEN WHO WANT TO QUIT WORK SOMEDAY

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- 57. HOW TO PLAN YOUR HOUSE TO SUIT YOURSELF
- 58. BUY NO DESK UNTIL YOU'VE SEEN THIS SENSATION OF THE BUSINESS SHOW
- 59. CALL BACK THESE GREAT MOMENTS AT THE OPERA
- 60. "I LOST MY BULGES...AND SAVED MONEY, TOO"
- 61. WHY (BRAND NAME) BULBS GIVE MORE LIGHT THIS YEAR
- 62. RIGHT AND WRONG FARMING METHODS AND LITTLE POINTERS THAT WILL INCREASE YOUR PROFITS
- 63. NEW CAKE-IMPROVER GETS YOU COMPLIMENTS GALORE!
- 64. IMAGINE ME...HOLDING AN AUDIENCE SPELLBOUND FOR 30 MINUTES
- 65. THIS IS MARIE ANTOINETTE RIDING TO HER DEATH
- 66. DID YOU EVER SEE A "TELEGRAM" FROM YOUR HEART?
- 67. NOW ANY AUTO REPAIR JOB CAN BE "DUCK SOUP" FOR YOU
- 68. NEW SHAMPOO LEAVES YOUR HAIR SMOOTHER EASIER TO MANAGE
- 69. IT'S A SHAME FOR YOU NOT TO MAKE GOOD MONEY WHEN THESE MEN DO IT SO EASILY
- 70. YOU NEVER SAW SUCH LETTERS AS HARRY AND I GOT ABOUT OUR PEARS
- 71. THOUSANDS NOW PLAY WHO NEVER THOUGHT THEY COULD
- 72. GREAT NEW DISCOVERY KILLS KITCHEN ODORS QUICK! MAKES INDOOR AIR "COUNTRY-FRESH"
- 73. MAKE THIS 1-MINUTE TEST OF AN AMAZING NEW KIND OF SHAVING CREAM
- 74. ANNOUNCING...THE NEW EDITION OF THE ENCYCLOPEDIA THAT MAKES IT FUN TO LEARN THINGS
- 75. AGAIN SHE ORDERS... "A CHICKEN SALAD, PLEASE"

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- 76. FOR THE WOMAN WHO IS OLDER THAN SHE LOOKS
- 77. WHERE YOU CAN GO IN A GOOD USED CAR
- 78. CHECK THE KIND OF BODY YOU WANT
- 79. "YOU KILL THAT STORY OR I'LL RUN YOU OUT OF THE STATE!"
- 80. HERE'S A QUICK WAY TO BREAK UP A COLD
- 81. THERE'S ANOTHER WOMAN WAITING FOR EVERY MAN AND SHE'S TOO SMART TO HAVE "MORNING MOUTH"
- 82. THIS PEN "BURPS" BEFORE IT DRINKS BUT NEVER AFTERWARDS!
- 83. IF YOU WERE GIVEN \$200,000 TO SPEND ISN'T THIS THE KIND OF (TYPE OF PRODUCT, BUT NOT BRAND NAME) YOU WOULD BUILD?
- 84. "LAST FRIDAY...WAS I SCARED!—MY BOSS ALMOST FIRED ME!"
- 85. 76 REASONS WHY IT WOULD HAVE PAID YOU TO ANSWER OUR AD A FEW MONTHS AGO
- 86. SUPPOSE THIS HAPPENED ON YOUR WEDDING DAY!
- 87. DON'T LET ATHLETE'S FOOT "LAY YOU UP"
- 88. ARE THEY BEING PROMOTED RIGHT OVER YOUR HEAD?
- 89. ARE WE A NATION OF LOWBROWS?
- 90. A WONDERFUL TWO YEARS' TRIP AT FULL PAY BUT ONLY MEN WITH IMAGINATION CAN TAKE IT
- 91. WHAT EVERYBODY OUGHT TO KNOW...ABOUT THIS STOCK AND BOND BUSINESS
- 92. MONEY-SAVING BARGAINS FROM AMERICA'S DIAMOND DISCOUNT HOUSE
- 93. FORMER BARBER EARNS \$8,000 IN 4 MONTHS AS A REAL ESTATE SPECIALIST
- 94. FREE BOOK TELLS YOU 12 SECRETS OF BETTER LAWN CARE

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- 95. GREATEST GOLD-MINE OF EASY "THINGS-TO-MAKE" EVER CRAMMED INTO **ONE BIG BOOK**
- 96. \$80,000 IN PRIZES! HELP US FIND THE NAME FOR THESE NEW KITCHENS
- 97. NOW! OWN FLORIDA LAND THIS EASY WAY...\$10 DOWN AND \$10 A MONTH
- 98. TAKE ANY 3 OF THESE KITCHEN APPLIANCES FOR ONLY \$8.95 (VALUES UP TO **\$15.45**)
- 99. SAVE 20 CENTS ON TWO CANS OF CRANBERRY SAUCE LIMITED OFFER
- 100. ONE PLACE SETTING FREE FOR EVERY THREE YOU BUY!



#### Inspiration: More Compelling Ads For Your Swipe File









# **FROM 4 PACKS A DAY** TO ZERO, IN 4 HOURS!

And he hasn't touched a cigarette again in 6 years!

in pulprieries by site steador's bigest Press: This book does not promise you, of course, that YOU will be able luplicate this appeal. But it does promise you this: IF YOU READ NOTHING ELSE, READ THIS: make her long or form their year's standard. He make the contraction of the contraction of the standard of a make, the bank is auditable to the Standard Singer Peac or Stay and the Standard of the Standard Singer Peac and the Standard of the Standard Standard Singer Standard August 1997 to a time standard or approximately indicate and make a produce organization of the state of And Last its Report This Anni 14 Steps in The December part is that have the To Step Southing With Step Steps ... In this last the Southing

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#### **2 Money Disasters That Could Strike on Saturday**



## "How I raised myself from a failure at 29 to become a \$250 per day success!"

I want to take advantage of your get often to need my PEEK Probe Section's great best-order, "don't Bained MyALE from Failure to forces in Selling," together with the bown the clarked before as no less selected. ""WORD FOWER MADE EASY" by Aurona forth

Bit Levils shows you have, as 3 short words in boild a right

effective vocalizary, invalide 20 new words in last 5 hours

\$3.3.50 "YOUR CREATIVE POWER" by Airs Colors

Jan Onlors shows you many than 300 years to make your

MODELL Creative power page off for you, how to \$11.00

#### REVOLUTIONARY NEW KIND OF DRAIN OPENER INVENTED: UNCLOGS DRAINS IN 1 SECOND



### How to make successful television commercials





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