



WHAT DOES JUZZ MARKETING LEADS GENERATION DO?



Juzz Marketing provides lead generation services through telemarketing and digital marketing for financial advisors to help them shorten their insurance sales cycle so that they can save time and close more cases.

5 stages of the insurance sales cycle:

Leads ➡ Appt Settings ➡ Appts Met ➡ Appt Closed ➡ Referrals & Repeat Sales

HOW TO ACHIEVE MDRT, COT, TOT USING JUZZ PACKAGES



Goal: Close the projected number of cases required for each milestone using Jazz Packages.
Every 3 cases closed = **\$10,000 commission target.**

1. TARGETED LEADS		COMMISSION METHOD			 Every 3 cases closed = \$10,000 COMMISSION TARGET
		MDRT 2027	COT 2027	TOT 2027	
Annual Commission Target		\$75,800	\$227,400	\$454,000	
Projected Cases Required (Assume each case \$3,000 comm)		25	75	150	
Packages Required 500 leads @ \$1,000 1 appt / 20 prospects spoken 30% turn-up 30% close		8	25	50	
Total Spend (Each package 500 leads @ \$1,000)		\$8,000	\$25,000	\$50,000	
GROSS PROFIT (Potential)		\$67,800	\$202,400	\$404,000	
2. APPOINTMENT SETTINGS		COMMISSION METHOD			 Every 3 cases closed = \$10,000 COMMISSION TARGET
		MDRT 2027	COT 2027	TOT 2027	
Annual Commission Target		\$75,800	\$227,400	\$454,000	
Projected Cases Required (Assume each case \$3,000 comm)		25	75	150	
Packages Required (50 appts @ \$3,900 20% turn-up 30% closing rate)		8	25	50	
Total Spend (Each package 50 appt settings @ \$3,900)		\$31,200	\$97,500	\$195,000	
GROSS PROFIT (Potential)		\$44,600	\$129,900	\$259,000	
3. AI BONA LEADS		COMMISSION METHOD			 Every 3 cases closed = \$10,000 COMMISSION TARGET
		MDRT 2027	COT 2027	TOT 2027	
Annual Commission Target		\$75,800	\$227,400	\$454,000	
Projected Cases Required (Assume each case \$3,000 comm)		25	75	150	
Packages Required (50 AI BONA Leads @ \$1,500 1 appt / 5 leads 30% turn-up 30% close)		25	75	150	
Total Spend (Each package 50 AI Bona leads @ \$1,500)		\$37,500	\$112,500	\$225,000	
GROSS PROFIT (Potential)		\$38,300	\$114,900	\$229,000	
4. OPT IN LEADS		COMMISSION METHOD			 Every 3 cases closed = \$10,000 COMMISSION TARGET
		MDRT 2027	COT 2027	TOT 2027	
Annual Commission Target		\$75,800	\$227,400	\$454,000	
Projected Cases Required (Assume each case \$3,000 comm)		25	75	150	
Packages Required (300 Opt-In Leads @ \$6,000 30% appt made 30% turn-up 10% close)		8	25	50	
Total Spend (Each package 300 Opt in leads @ \$6,000)		\$48,000	\$150,000	\$300,000	
GROSS PROFIT (Potential)		\$27,800	\$77,400	\$154,000	

HOW JUZZ PACKAGES HELP YOU ACHIEVE MORE



There are other marketing agencies in Singapore. Why should advisors choose Jazz Marketing



- We are approved vendor of several insurance companies in Singapore. This ensures that the leads are compliant with industry standards and regulatory guidelines
- Jazz leads have been cleaned and preprocessed to ensure that all the numbers are in use before sending to advisors. Therefore, this ensures that the answered rates are high.
- The packages come with guarantee cases closed.

2025 Performance Highlights

★ Consistent Lead Generation & Conversions

More than 80% of financial advisors who took up the packages managed to achieve the cases closed that Jazz guaranteed

★ High Repeat Customer Strength

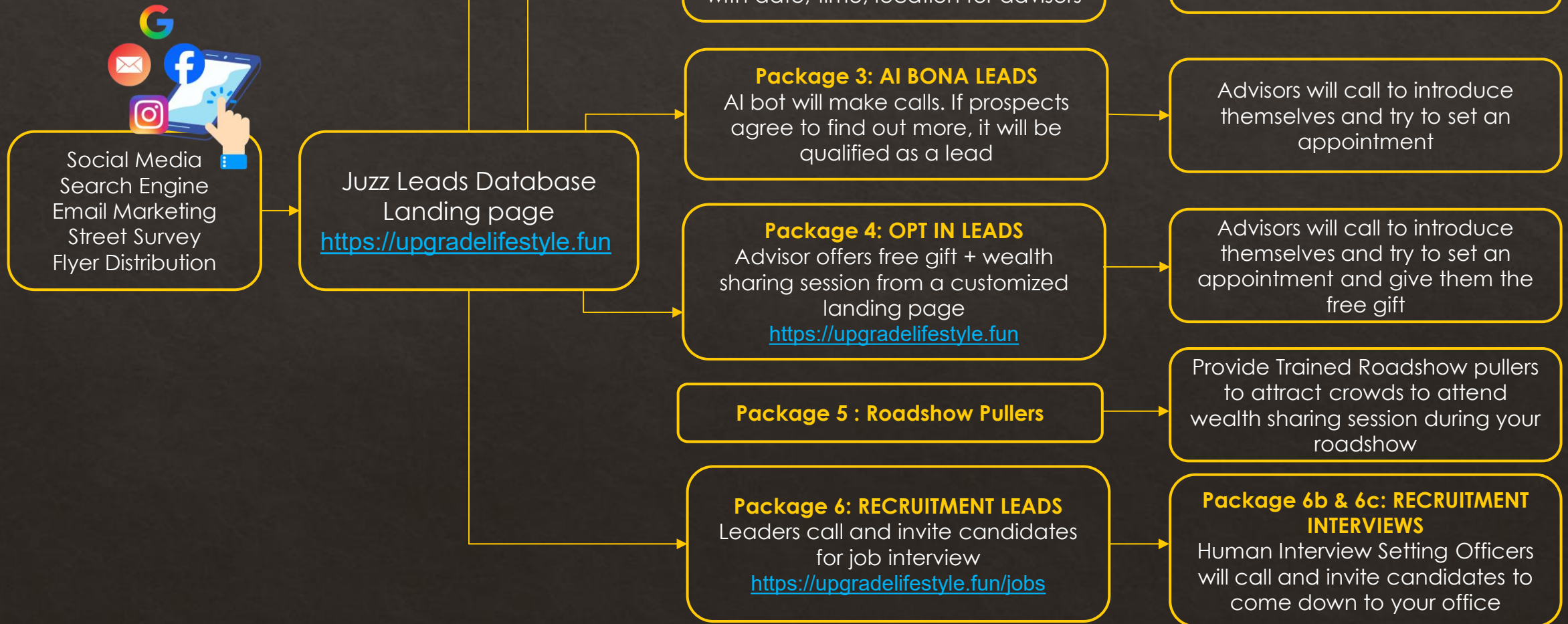
More than 80% of financial advisors who took up the packages renew their packages within a year.

★ Closing records verified

We are approved vendor of several insurance companies in Singapore and the cases closed that we claimed are monitored and verified by their back office



USER JOURNEY



COMPARE

JUZZ	Targeted Leads	Appointments Settings	AI Bona	Opt in
Compliance	✓	✓	✓	✓
Exclusive	✓	✓	✓	✓
Guarantee Case Closed	✓	✓	✓	✓
Fresh	✗	✓	✓	✓
Gift Method Element	✗	10%	10%	100%



PACKAGE (1) TARGETED LEADS (Suitable for cold calling)



Leads Generation for financial advisors	Rates	Remarks
1(A) MDRT Achiever Package 500 targeted leads \$2.00/lead 21 years old and above with min \$30,000 per year income Includes name, mobile, income range, and age range	\$1000	Guarantee min 3 cases closed Target 10 cases closed
1(B) COURT of Table Achiever Package 1600 targeted leads \$1.50/lead 21 years old and above with min \$30,000 per year income Includes name, mobile, income range, and age range	\$2400	Guarantee min 6 cases closed Target 30 cases closed (You saved \$800)
1(C) TOP of Table Achiever Package 5000 targeted leads \$1.00/lead 21 years old and above with min \$30,000 per year income Includes name, mobile, income range, and age range	\$5000	Guarantee min 9 cases closed Target 100 cases closed (You save \$5000)



How much is my projected returns on Marketing investments for your for your Package (1) Targeted Leads?



- Around 80% of financial advisors who took our packages in 2025 were able to secure at least one appointment after speaking with approximately 20 prospects, achieving an average 30% meetup rate and 30% closing rate.
- Financial advisors are expected to put in their best efforts and apply the appropriate strategies in order to achieve optimal results.
- At Juzz, we conduct a sharing session for all onboarded clients to guide advisors on the best approaches to improve their appointment-setting, meetup rates, and closing performance.

Normal Case Scenario

500 targeted leads

25 appt setting(5% conversion)

8 appt met(30% conversion)

3 case closed(30% conversion)

Good case Scenario

500 targeted leads

50 appt settings(10% conversion)

35 appt met(70% conversion)

10 cases closed(30% conversion)



There are other marketing agencies selling targeted leads and at a cheaper rate. Why should I choose Juzz Marketing?



Juzz Marketing targeted leads has 2 competitive advantage

Juzz targeted leads have been cleaned and preprocessed to ensure that all the numbers are in use before sending to advisors. Therefore, this ensures that the pickup rates are high

The packages come with guarantee cases closed.

Targeted Leads

Leads suitable for cold calling

PROS	JUZZ	OTHERS
Exclusive	✓	✗
Guarantee Case Closed	✓	✗
Answered Rates	High	Low
CONS	JUZZ	OTHERS
Rates	\$2	\$1



What is my potential sales revenue from taking up package 1 Targeted Leads?



Usually for 3 cases closed, advisors will target a commission of \$10,000.



Key points to take note for Package 1 Targeted leads



These leads are suitable for cold calling. They are not ready buying prospects or prospects expressing interest to discuss about insurance / investments products.

Advisors are expected to put in best efforts to discover their needs and achieve the desirable results.



PACKAGE (2) APPOINTMENT SETTINGS

Appointment Settings: We set wealth sharing session appts for you to meet the prospects within 14 days with their **name, age, mobile, occupation, date, time and location**.

We have a website <https://upgradelifestyle.fun> that we use to generate leads for businesses, property agents and financial advisors. We use these leads to set appointments for you.



Leads Generation for financial advisors	Rates	Remarks
2(A) MDRT Achiever Package 50 exclusive appt settings@\$3900 (\$78/appt setting) 21 years old and above with min \$30,000/year income	\$3900	Guarantee min 3 cases closed Target 10 cases closed
2(B) COURT of Table Achiever Package 100 exclusive appts settings@\$7500 (\$75/appt setting) 21 years old and above with min \$30,000/year income	\$7500	Guarantee min 6 cases closed Target 20 cases closed (You save \$600)
2(C) TOP of Table Achiever Package 300 exclusive appts settings@\$21600 (\$72/appt setting) 21 years old and above with min \$30,000/year income	\$21600	Guarantee min 9 case closed Target 30 cases closed (you save \$3600)



What is my projected returns on Marketing Investments for your Package (2) Appointment Settings?



- Around 80% of financial advisors who took our packages in 2025 were able to achieve at least an average 20% meetup rate and 30% closing rate.
- Financial advisors are expected to put in their best efforts and apply the appropriate strategies in order to achieve optimal results.
- At Juzz, we conduct a sharing session for all onboarded clients to guide advisors on the best approaches to improve their appointment-setting, meetup rates, and closing performance.

Normal Case Scenario

50 exclusive appointment settings
10 prospects met (20% conversion)
3 cases closed (20% conversion)

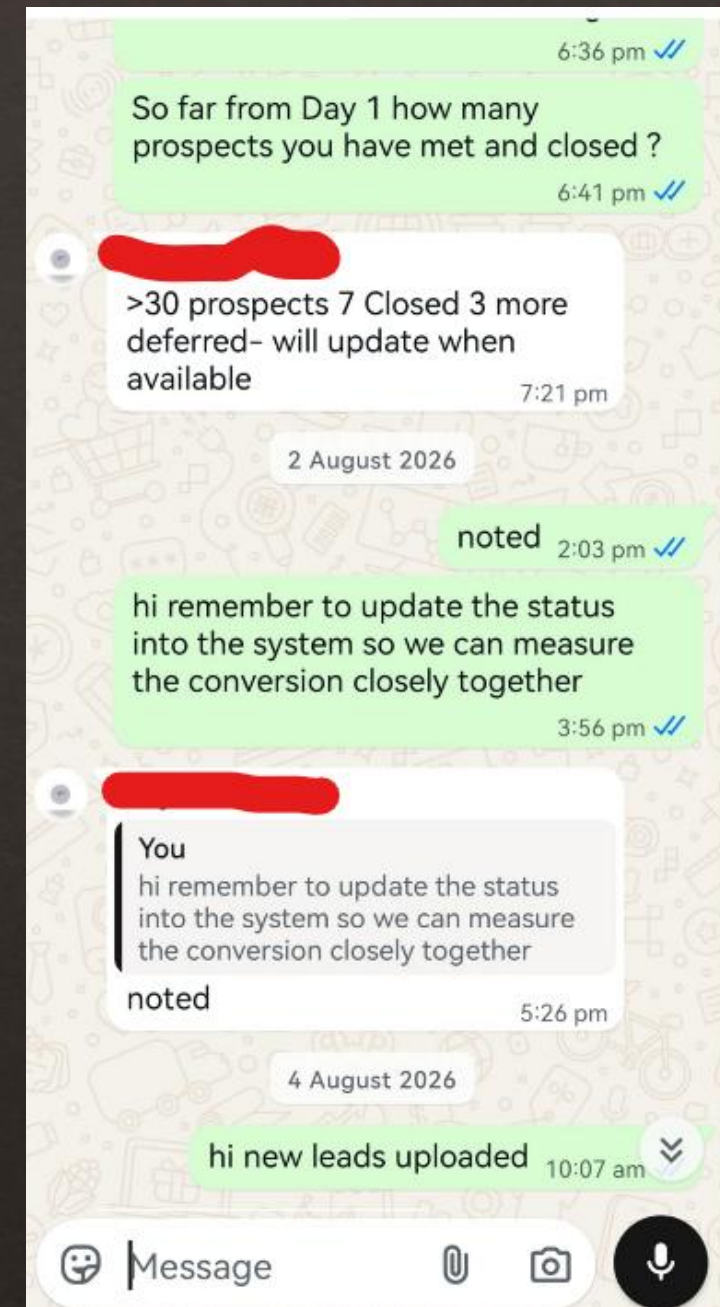
Good Case Scenario

50 exclusive appointment settings
35 prospects met (70% conversion)
10 cases closed (30% conversion)

Case Studies and Testimonials (Aug 2026) (Appointment Settings)

- ★ Desmond (not his real name), a 40-year-old financial advisor who was struggling with his production and was close to being terminated by his company
- ★ Desmond was facing a difficult period in his career, with low production putting his position at risk. He decided to take action by increasing his prospecting activities and creating more opportunities to meet potential clients.
- ★ After taking up Juzz Package, Desmond managed to meet more than 30 prospects and close 7 cases, with another 3 cases deferred and pending further updates. His experience shows how having a consistent pipeline of prospects can give a struggling advisor more opportunities to meet clients, improve production and work towards turning his situation around.

Disclaimer: As instructed by an insurance company that previously requested us to remove testimonials from its agents and their names, we have since applied this practice across all insurance companies by removing agents' names and identifying details from our testimonials.





There are other marketing agencies doing appointment settings and I can also hire someone myself to set appointments. Why should I choose Juzz Marketing?



- ✓ We guarantee the number of appointments settings
- ✓ The packages comes with guaranteed cases closed
- ✓ Our appointment setting officers are local Singaporeans and Malaysians with good spoken English and prospects will be able to understand them well.
- ✓ Some call centres charge a fixed monthly rate and they do not guarantee the number of appointments and the number of cases closed. And if you hire someone on your own, you will need to pay a fixed salary and the number of appointments they can make per month is not guaranteed too and you need to spend time monitoring them instead of focusing your energy on sales.

Appointment

Wealth sharing session appointments for you to meet the prospects within 14 days with their name, age, mobile, occupation, date, time and location.

PROS	JUZZ	OTHERS
Exclusive	✓	✗
Guarantee Case Closed	✓	✗
Rates	\$78	\$350
CONS	JUZZ	OTHERS
Turn up Rates Guaranteed	✗	✓



What is my potential sales revenue from taking up Package 2 Appointment Setting Leads?



Usually for 3 cases closed, advisors will target a commission of \$10,000.



Key points to take note for Package 2 Appointment Setting Leads



The appt settings leads are prospects who only agree to meet to discuss about insurance/investments. They are not ready buying prospects or prospects expressing interest to discuss about insurance/investments products.

Advisors are expected to put in best efforts to achieve the desirable results.



PACKAGE (3) AI BONA LEADS

We have a website <https://upgradelifestyle.fun> that we use to generate leads for businesses, property agents and financial advisors. We will use these leads to invite prospects who do not mind finding out more about investments/financial review to opt in via **AI Telemarketing and WhatsApp Marketing**.



Leads Generation for financial advisors	Rates	Remarks
3(A) MDRT Achiever Package 50 AI Bona Leads (\$30/lead) 21 years old and above with min \$30,000/year income	\$1500	Guarantee min 1 cases closed Target 3 cases closed
3(B) COURT of Table Achiever Package 120 AI Bona Leads (\$25/lead) 21 years old and above with min \$30,000/year income	\$3000	Guarantee min 2 cases closed Target 6 cases closed (You save \$600)
3(C) TOP of Table Achiever Package 300 AI Bona Leads (\$20/lead) 21 years old and above with min \$30,000/year income	\$6000	Guarantee min 6 cases closed Target 18 cases closed (you save \$3000)



How much is my projected returns on Marketing investments for your for your Package (3) AI Bona Leads?



- Around 80% of financial advisors who took our packages in 2025 were able to secure at least one appointment settings after speaking with approximately 5 AI Bona leads, achieving an average 30% meetup rate and 30% closing rate.
- Financial advisors are expected to put in their best efforts and apply the appropriate strategies in order to achieve optimal results.
- At Juzz, we conduct a sharing session for all onboarded clients to guide advisors on the best approaches to improve their appointment-setting, meetup rates, and closing performance.

Normal Case Scenario

50 AI Bona leads

10 appt setting(5% conversion)

3 appt met(30% conversion)

1 case closed(20% conversion)

Good Case scenario

50 AI Bona leads

35 appt settings(10% conversion)

10 appt met(70% conversion)

3 cases closed(30% conversion)



There are other marketing agencies that can provide AI Telemarketing. Why should I choose Juzz Marketing?



- ✓ Our AI models are built and trained in house and the AI telemarketers use a local Singaporean accent to talk to prospects. Therefore the quality of the call is better as prospects can understand them better.
- ✓ There are a few other AI telemarketing companies in the market but they do not build their AI models themselves. They licensed them from third party and they use an American accent. Therefore sometimes prospects may not be able to understand what the AI Telemarketer is saying.

AI Bona

AI-powered telemarketing system that automates leads generation.

PROS

Exclusive
Guarantee Case Closed
Local SG Accent

JUZZ



OTHERS



CONS

Not enough data yet

JUZZ

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OTHERS

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What is my potential sales revenue from taking up Package 3 AI Bona Leads?



Usually for 3 cases closed, advisors will target a commission of \$10,000.



Key points to take note for Package 3 AI Bona Leads



AI Bona leads are prospects who only agree to discuss about investments. No appointments has been set yet. Advisors are required to call them and do their best to set an appointment. They are not ready buying prospects or prospects expressing interest to discuss about insurance/investments products.

Advisors are expected to put in best efforts to achieve the desirable results.



PACKAGE (4) OPT IN LEADS

Juzz Marketing will generate leads via E-mail Marketing, Facebook, Instagram and Google ads to get prospects to opt in for a wealth sharing session + free gift in one of the landing pages in our lifestyle portal such as: <https://upgradelifestyle.fun/investment/biz05/start-to-build-the-life-you-envision/>



Leads Generation for financial advisors	Rates	Remarks
4(A) MDRT Achiever Package 130 opt in leads@\$3900 (\$30 per lead) 21 years old and above with min \$30,000/year income	\$3900	Guarantee min 1 case closed Target 3 cases closed
4(B) COURT of Table Achiever Package 200 opt in leads@\$5000 (\$25 per lead) 21 years old and above with min \$30,000/year income	\$5000	Guarantee min 2 cases closed Target 6 cases closed (You save \$1000)
4(C) TOP of Table Achiever Package 300 opt in leads@\$6000 (\$20 per lead) 21 years old and above with min \$30,000/year income	\$6000	Guarantee min 3 cases closed Target 9 cases closed (you save \$3000)



How much is my expected returns on Marketing investments for your for your Package (4) Opt in Leads?



- Around 80% of financial advisors who took our packages in 2025 were able to secure at least one appointment settings after speaking with approximately 3 Opt leads, achieving an average 30% meetup rate and 10% closing rate.
- Financial advisors are expected to put in their best efforts and apply the appropriate strategies in order to achieve optimal results.
- At Juzz, we conduct a sharing session for all onboarded clients to guide advisors on the best approaches to improve their appointment-setting, meetup rates, and closing performance.

Normal Case Scenario

130 Opt in leads

30 Appts Made(30% appt made)

10 Appts Met(30% turn up)

1 Case Closed(10% closed)

Good Case Scenario

130 Opt in leads

90 Appts Made(70% conversion)

30 Appt Met(30% turn up)

3 Cases Closed (30% conversion)



There are other marketing agencies that can generate opt in leads. Why should choose Juzz Marketing?



A lot of marketing agencies charges an upfront setup before starting the lead generation campaign and the number of leads are not guaranteed

At Juzz Marketing, the number of leads you will receive is guaranteed and we charge \$0 setup fee.

Opt in

The opt-in leads strategy uses free gift to connect with potential prospects.

PROS	JUZZ	OTHERS
Exclusive	✓	✓
Guarantee Case Closed	✓	✗
Set up Fee	\$0	\$3000

CONS	JUZZ	OTHERS
Turn up rates Guarantee	✗	✗



What is my potential sales revenue from taking up Package 4 Opt in Leads?



Usually for 3 cases closed, advisors will target a commission of \$10,000.



Key points to take note for Package 4 Opt in Leads



This is a free gift method. Prospects basically opt in to receive a free gift and upon meeting the advisor for a sharing session, he or she will be entitled to the free gifts. Prospects may show no interest in insurance/investments during the meeting with advisors. Advisors are expected to put in best efforts to stimulate their interest.

Cost of free gifts may be borne by the advisors.



PACKAGE (5) ROADSHOW PULLERS

Juzz Marketing will generate leads for financial advisors by identifying prospective clients for you during your roadshow for you so that you can save time and focus on your presentation and close more cases.



Leads Generation for financial advisors	Rates	Remarks
5(A) MDRT Achiever Package 64 hours@\$40/hr + 380 appts@ \$3/appt 21 years old and above with min \$30,000 per year income	\$3700	Guarantee min 3 cases closed Target 10 cases closed
5(B) COURT of Table Achiever Package 128 hours@\$38/hr + 760 appts@ \$3/appt 21 years old and above with min \$30,000 per year income	\$7100	Guarantee min 6 cases closed Target 20 cases closed (You save \$300)
5(C) TOP of Table Achiever Package 192 hours@\$35/hr + 1140 appts@ \$3/appt 21 years old and above with min \$30,000 per year income	\$10100	Guarantee min 9 case closed Target 30 cases closed (you save \$1000)



There are other marketing agencies that can provide pullers to financial advisor. Why should choose Juzz Marketing?

Our roadshow pullers are local Singaporeans and Malaysians with well spoken English and prospects will be able to understand them well.

They are also well trained in street prospecting. The conversion will be better and therefore you will have more appointments.

Our pullers do not just offer free gifts during roadshows. They will also let prospects know the objective of the appointment, that is to do a financial review or wealth sharing session.



PACKAGE (6) RECRUITMENT PACKAGE FOR AGENCY LEADERS

Source: <https://upgradelifestyle.fun/jobs/>



Recruitment Leads	Rates	Remarks
6(A) 500 Thunder Recruitment Leads @\$3 each Min A level or Local Diploma	\$1500	Guarantee minimum 1 RNF (Target to recruit 1 to 3 agents)
6(B) 1600 Lighting Recruitment Leads @\$2 each Min A level or Local Diploma	\$3200	Guarantee minimum 2 RNF (Target to recruit 2 to 8 agents)
6(C) 5000 Superman Recruitment Leads @\$1.50 each Min A level or Local Diploma	\$7500	Guarantee minimum 6 RNF (Target to recruit 6 to 18 agents)

Interview Settings	Rates	
6(D) Thunder Speed 20 Interview Settings 1 to 1 face to face interview Min A level or Local Diploma	\$3600	Guarantee minimum 1 RNF (Target to recruit 1 to 3 agents)
6(E) Lightning Speed 60 Interview Settings 1 to 1 face to face interview Min A level or Local Diploma	\$9000	Guarantee minimum 2 RNF (Target to recruit 2 to 8 agents)
6(F) Superman Speed 150 Interview Settings 1 to 1 face to face interview Min A level or Local Diploma	\$18000	Guarantee minimum 6 RNF (Target to recruit 6 to 18 agents)



How many agents can I expect to recruit from your Superman Speed Recruitment Leads?



- Around 80% of leaders who took our packages in 2025 were able to at least fix an interview after calling to 20 candidates, achieve at least an average 25% turn up rate and 20% recruitment rate.
- Financial advisors are expected to put in their best efforts and apply the appropriate strategies in order to achieve optimal results.
- At Juzz, we conduct a sharing session for all onboarded clients to guide advisors on the best approaches to improve their interview-setting, turn up rates, and closing performance.

Normal Case Scenario

500 Thunder Recruitment Leads

25 interviews settings(20% conversion)

6 turn up (30% conversion)

1 agent recruited (15% conversion)

Good case Scenario

500 Thunder Recruitment Leads

25 interview settings

17 turn up (70% conversion)

3 agents recruited 20% conversion)



There are job portals that sell leads for recruitment too at a cheaper rate. Why should I purchase recruitment leads from Jazz Marketing?



Our recruitment leads are exclusive therefore the conversion is higher.

The job portals are pretty competitive as many agency leaders are already using these job portals to recruit potential candidates.



How many agents can I expect to recruit from your Superman Speed Recruitment Interview Settings Package?



- Around 80% of leaders who took our packages in 2025 were able to achieve at least an average 25% turn up rate and 20% recruitment rate.
- Financial advisors are expected to **put in their best efforts and apply the appropriate strategies** in order to achieve optimal results.
- At **Juzz**, we conduct a **sharing session for all onboarded clients** to guide advisors on the best approaches to improve their **interview-setting, turn up rates, and closing performance**.

Normal Case Scenario

20 interviews settings

5 turn up (25% conversion)

1 agent recruited (20% conversion)

Good case Scenario

20 interview settings

14 turn up (70% conversion)

3 agents recruited (20% conversion)



There are other marketing agencies that can schedule recruitment interviews for agency leaders. Why should choose Juzz Marketing?



Our recruitment interview settings are exclusive as candidates will only be send to one leader at a time. The candidates are also not incentified to go for interview. Therefore, the recruitment conversion is higher.

Case Studies and Testimonials (Jan 2024)

Recruitment

- ★ Andy (not his real name), a Financial Services Director looking to grow his agency through recruitment
- ★ Andy has worked with us over the years to support his recruitment efforts. Through the campaigns, he shared that he had successfully recruited 4 people and continued to renew the service.
- ★ The conversation also shows his continued interest in scaling recruitment, including planning for 150 recruitment leads for his next campaign.

Disclaimer: As instructed by an insurance company that previously requested us to remove testimonials from its agents and their names, we have since applied this practice across all insurance companies by removing agents' names and identifying details from our testimonials.



Recruitment Leads

Interview Settings

PROS	JUZZ	JUZZ (G)	OTHERS
Exclusive	✓	✓	✗
Recruitment Rate	High	High	Low
Candidates Incentified	No	Yes	Yes
Rates	\$180	\$390	\$350

CONS	JUZZ	JUZZ (G)	OTHERS
Guarantee Turn up	✗	✓	✓



How do I get started?

- ➔ Confirm order by sending name to be indicated in the invoice
- ➔ Juzz issues invoice
- ➔ Advisor makes payment
- ➔ Campaign start within 7 calendar days after payment received



Payment mode(Paynow)
UEN 201332245R001

Payment mode(Fund Transfer)
Juzz Marketing Pte Ltd
UOB Current account
396-314-638-6