



WHAT DOES JUZZ MARKETING LEADS GENERATION DO?



Juzz Marketing provides lead generation services 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 Juzz Packages.

Every 3 cases closed = **\$10,000 commission target.**



1 OPT IN LEADS

	MDRT 2027	COMMISSION METHOD 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 100 Opt-In Leads @ \$3,000 50% appt made 30% turn-up 20% closing rate	9	25	50
Total Spend (Each package 100 Opt-In Leads @ \$3,000)	\$27,000	\$75,000	\$150,000
GROSS PROFIT (Potential)	\$48,800	\$152,400	\$304,000



Every 3 cases closed =

\$10,000
COMMISSION
TARGET



2 TARGETED LEADS

	MDRT 2027	COMMISSION METHOD 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



Every 3 cases closed =

\$10,000
COMMISSION
TARGET



3 APPOINTMENT SETTINGS

	MDRT 2027	COMMISSION METHOD 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



Every 3 cases closed =

\$10,000
COMMISSION
TARGET



**HOW JUZZ PACKAGES
HELP YOU ACHIEVE MORE**



HIGH QUALITY LEADS
Cleaned, verified &
pre-qualified



AI PRE-QUALIFICATION
AI Assistant warms up
prospects before you call



GUARANTEED CASES
Packages come with
guaranteed cases closed



**MORE MEETINGS.
MORE CASES.
MORE COMMISSIONS.**



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.

2026 Performance Highlights

1 Jan 2026 to 29 Aug 2026

★ 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



Social Media
Search Engine
Email Marketing
Street Survey
Flyer Distribution

Juzz Leads Database
Landing page
<https://upgradelifestyle.fun>

Package 1: OPT IN LEADS

Advisor offers free gift + wealth sharing session from a customized landing page

Package 2: TARGETED LEADS

Advisor will call the leads directly to set an appointment with/without free gifts

Package 3: APPOINTMENT SETTINGS

Human Appointment Setting Officer call and set a wealth sharing session + free gifts with date, time, location for advisors. Advisors will call to introduce themselves and go for the appointment

Package 4 : Walkway Flyer Distribution

We will send flyer distributors to distribute your flyers. Scan QR code for free gifts + wealth sharing session

Package 5: Roadshow Pullers

Provide Trained Roadshow pullers to attract crowds to attend wealth sharing session + free gifts during your roadshow

Package 6: RECRUITMENT LEADS & INTERVIEWS SETTINGS & Personal Branding for Advisors/Agencies

Recruitment Leads : Leaders buy recruitment leads and call to invite candidates to come for job interviews
Interview Settings: Human Interview Setting Officers will call and invite candidates to come down to your office

Understanding the Difference Between Opt-In Leads, Targeted Leads & Appointment Settings

★ Important Rule: 1 Campaign = 1 Advisor ★



Package 1: Opt-In Leads

- **Price:** \$30 per lead
- **Source:** Recent genuine UpgradeLifestyle enquiry + free-gift opt-in
- Prospect is connected to the advisor assigned to that campaign
- **1 campaign = 1 advisor**
- Advisor may sponsor a free gift of their choice
- Gift shown in the campaign image is only an example
- Free gift is only given after the prospect attends the wealth-sharing session



Package 2: Targeted Leads

- **Price:** \$2 per lead
- **Source:** Eligible leads from the Juzz database
- Advisor calls the lead directly
- Lower-cost option for advisors who do their own calling
- Additional filtering can be arranged based on campaign requirements



Package 3: Appointment Settings

- **Price:** \$78 per appointment
- Built on top of Package 2 targeted leads
- Our human appointment setting officer calls the prospect
- We arrange the date, time and location for the advisor
- Advisor receives a booked appointment instead of just a lead

Example: Mr Tan Signs Up 3 Times = 3 Campaigns = 3 Advisors



1. Day 1 – Campaign A

Mr Tan signs up for UpgradeLifestyle Campaign A. He is an opt-in lead and assigned to Advisor A as a separate **Package 1 Opt-In Lead**.



2. Day 3 – Campaign B

Mr Tan signs up again through Campaign B. This is a targeted lead and assigned to Advisor B, only after 6 months due to the exclusive clause, as a **separate Package 2 Targeted Lead**.



3. Day 5 – Campaign C

Mr Tan signs up again through Campaign C. This is a targeted lead and assigned to Advisor C, only after 6 months due to the exclusive clause, as a **separate Package 2 Targeted Lead**.



4. What This Means

Even though it is the same person, the 3 sign-ups came from 3 different campaigns. Therefore, they are linked to 3 different advisors at different times.



Key Takeaway

- ✓ **1 Campaign = 1 Advisor**
- ✓ **Package 1 = Opt-In leads** (warmer prospects who have taken an action)
- ✓ **Package 2 = Targeted leads** (lower-cost options for advisors who do their own calling)
- ✓ **Package 3 = Appointment settings** (built on targeted leads, plus our human appointment-setting service)



COMPARE

Find the right package for your goals

*More Leads.
More Opportunities.*

Features



Compliance

Compliant with industry guidelines



Exclusive

Assigned to one advisor per campaign



Case-Closed Guarantee

Selected packages include guarantee



Fresh Leads

Newer / more recent leads

Package 1

Opt-In Leads

(Higher intent prospects)



Package 2

Targeted Leads

(Suitable for cold calling)



No

Package 3

Appointment Settings

(We set the appointment)



Yes



Different approaches. Same goal.

Quality leads, more appointments and more closed cases for your success.



PACKAGE (1) OPT IN LEADS

Juzz Marketing will generate leads through online and offline marketing. Prospects will opt in for a wealth-sharing session + free gift via our <https://upgradelifestyle.fun/> landing pages.



Leads Generation for financial advisors	Rates	Remarks
1(A) MDRT Achiever Package 100 opt in leads @ \$3,000 (\$30 per lead) 21 years old and above with min \$30,000/year income	\$3,000	Guarantee min 3 cases closed Target 10 cases closed (You save \$1,500)
1(B) COURT of Table Achiever Package 300 opt in leads @ \$7,500 (\$25 per lead) 21 years old and above with min \$30,000/year income	\$7,500	Guarantee min 6 cases closed Target 20 cases closed (You save \$3,000)
1(C) TOP of Table Achiever Package 900 opt in leads @ \$18,000 (\$20 per lead) 21 years old and above with min \$30,000/year income	\$18,000	Guarantee min 9 cases closed Target 60 cases closed (You save \$9,000)



For 3 cases closed, advisors can typically target approximately
\$10,000 in commission.*

*Actual commission may vary depending on the products sold, case size, advisor performance, and other factors.

Same Home.
More Possibilities. 

**POST AN
ENQUIRY &
SPIN & WIN FREE GIFT!**

Why search for services?
Let them come to you.

SPIN & WIN FREE GIFT!



20" Luggage
(Stylish & Durable)



Grocery Trolley
(Practical & Reusable)



Scan Here! 

POST YOUR ENQUIRY NOW!
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It's Free & Easy!



Takes Less Than 2 Minutes!



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A Better Everyday Life

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Many Solutions. 

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1 Tuition



2 Home Cleaning



3 Aircon Servicing



4 Business Process
Outsourcing (BPO)



5 AI, Technology & IT



6 Renovation



7 Car Services



8 Event Services



9 Fitness &
Personal Training



10 Beauty & Wellness



11 Pet Services



12 Car Grooming



13 Photography &
Videography



14 Corporate
Secretarial Services



15 Accounting &
Bookkeeping



16 Moving Services



17 Pest Control



18 Plumbing Services



19 Electrical Services



20 Handyman Services



21 Painting Services



22 Interior Design



23 Catering &
Food Services



24 Legal Services



25 Childcare &
Babysitting



26 Enrichment Classes



27 Domestic Helper
Services



28 Wedding Services



29 Logistics &
Delivery Services



30 Auto Insurance

Support Local Businesses
Build a Better Singapore 



VENDORS WELCOME!

Be part of our growing community.
Reach more customers today!



www.upgradelifestyle.fun



Upgrade your lifestyle — the fun way. 



What is my projected return on marketing investment for **Package (1) Opt-In Leads**?

*More Intent.
More Opportunities.*

- ✓ Around **80%** of financial advisors who took our packages in 2026 were able to secure at least one appointment after speaking with approximately **2 opt-in leads**, and achieved an average **30% meetup rate** and **20% 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

(Based on average performance)



100

Opt-In Leads



50

Appointments Made
(50% appointment rate)



15

Appointments Met
(30% turn-up rate)



3

Cases Closed
(20% closing rate)



Approx.

3 Closed Cases

Good Case Scenario

(With higher appointment and turn-up rate)



100

Opt-In Leads



70

Appointments Made
(70% conversion)



50

Appointments Met
(70% turn-up rate)



10

Cases Closed
(20% closing rate)



Higher Closing Potential

Key Takeaways



Package 1 is suited for **higher-intent prospects** who have opted in.



Results depend on the **advisor's efforts**, follow-up and sales strategies.



Our **sharing sessions** help improve appointment-setting, meetup rates and closing performance.



Higher Intent. More Conversations. More Closed Cases.

Turn quality opt-in leads into real results with Juzz Marketing.

JUZZ
MARKETING

Your
Growth
Partner.

Individual results may vary depending on product mix, case size and advisor performance.



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



Juzz Marketing opt in leads has 3 competitive advantages:

1. Guaranteed Number of Leads

Know exactly how many leads you will receive before your campaign starts.

2. \$0 Setup Fee

No upfront setup fee. Your budget goes directly towards lead generation.

3. Hybrid Intent + Free Gift Approach

Unlike campaigns that rely mainly on free gifts, we combine prospect intent with free-gift incentives to generate more relevant opt-ins.



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

*More Leads.
More Opportunities.*

Jazz Marketing OPT-IN Leads has 3 competitive advantage

1



Guaranteed Number of Leads

Know exactly how many leads you will receive before your campaign starts.

2



\$0 Setup Fee

No upfront setup fee. Your budget goes directly towards lead generation.

3



Hybrid Intent + Free Gift Approach

Unlike campaigns that rely mainly on free gifts, we combine prospect intent with free-gift incentives to generate more relevant opt-ins.

Features



Compliance

Compliant with industry guidelines



Exclusive

Assigned to one advisor per campaign



Case-Closed Guarantee

Selected packages include guarantee



Fresh Leads

Newer / more recent leads



Prospect Intent

Prospects sign up via landing page to find out more



Setup Fee

Upfront campaign setup fee



Approach

Combination of content, marketing and free-gift incentives

Jazz Marketing Opt-In Leads



Yes



Yes



Yes



Yes



Higher intent



\$0



Hybrid approach

Other Marketing Agencies



Varies



Often shared with multiple advisors



Typically not included



Varies (usually older leads)



Generally lower intent



Usually required



Often rely mainly on free gifts



Better Quality Leads. Better Results.

A more strategic approach to generate opt-in leads for your success.



Same Goal.

More opportunities for you to meet, advise and close more cases.



PACKAGE (2) TARGETED LEADS (Suitable for cold calling)

Leads Generation for financial advisors

**Leads are obtained
6 to 18 months ago**

Package	Leads	Without Filter (Standard Price)	With 50% Loading (With Age and/or Income Filter)	Remarks
2(A) MDRT Achiever 500 targeted leads 20 years old and above	500	\$1,000 (\$2.00/lead)	\$1,500 (\$3.00/lead)	Guarantee min 3 cases closed Target 10 cases closed
2(B) COURT of Table Achiever 1,600 targeted leads 20 years old and above	1,600	\$2,400 (\$1.50/lead)	\$3,600 (\$2.25/lead)	Guarantee min 6 cases closed Target 30 cases closed (You saved \$800)
2(C) TOP of Table Achiever 5,000 targeted leads 20 years old and above	5,000	\$5,000 (\$1.00/lead)	\$7,500 (\$1.50/lead)	Guarantee min 9 cases closed Target 100 cases closed (You save \$5000)



Filtering Options (Package 2 Only)

You can currently filter based on age range and income range only.

Age Range	20 – 29 30 – 39 40 – 49 50 – 59 60 – 69
Income Range	\$30,000 – \$60,000 per year Above \$60,000 per year



Important Notes

- Leads are obtained **6 to 18 months ago**.
- If you choose to apply age and/or income filtering, there will be a **50% loading** on the standard package price.
- Package 2 is suitable for cold calling.
- Includes name, mobile, income range and age range.

*More Leads.
More Opportunities.*



For 3 cases closed, advisors can typically target approximately **\$10,000** in commission.*

*Actual commission may vary depending on the products sold, case size and advisor performance.



What is my projected return on marketing investment for **Package (2) Targeted Leads**?

*More Conversations.
More Opportunities.*

- ✓ 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

(Based on average performance)



500

Targeted Leads



25

Appointment Settings
(5% conversion)



8

Appointments Met
(30% meetup rate)



3

Cases Closed
(30% closing rate)



Approx.

3 Closed Cases

Good Case Scenario

(With stronger conversion performance)



500

Targeted Leads



50

Appointment Settings
(10% conversion)



35

Appointments Met
(70% meetup rate)



10

Cases Closed
(30% closing rate)



Higher Closing Potential

Key Takeaways



Package 2 is best suited for advisors who are comfortable **doing their own calling**.



Results depend on the **advisor's efforts**, follow-up and sales strategies.



Our **sharing sessions** help improve appointment-setting, meetup rates and closing performance.



More Leads. More Conversations. More Closed Cases.

Turn targeted leads into real results with Juzz Marketing.

JUZZ
MARKETING

Your
Growth
Partner.

Individual results may vary depending on product mix, case size and advisor performance.



Package 2 Targeted Leads Sample

Name	Mobile	Nationality	Age Range	Annual Income	Status	Last AI Assistant Call Time	Attempts	Status
		SG/PR	20-29	\$60,000 and above	▼	2026-08-28T11:28:33.189+08:00	1	answered
		SG/PR	50-59	\$60,000 and above	▼	2026-08-28T14:35:50.871+08:00	2	answered
		SG/PR	30-39	\$30,000-\$60,000	▼	2026-08-28T18:05:42.386+08:00	3	answered
		SG/PR	30-39	\$30,000-\$60,000	▼	2026-08-28T18:24:09.024+08:00	3	answered
		SG/PR	50-59	\$60,000 and above	▼	2026-08-28T11:28:59.346+08:00	1	answered
		SG/PR	40-49	\$30,000-\$60,000	▼	2026-08-28T14:51:30.489+08:00	2	answered
		SG/PR	40-49	\$60,000 and above	▼	2026-08-28T11:28:55.942+08:00	1	answered
		SG/PR	30-39	\$30,000-\$60,000	▼	2026-08-28T11:29:07.299+08:00	1	answered
		SG/PR	40-49	\$60,000 and above	▼	2026-08-28T15:17:47.705+08:00	2	answered
		SG/PR	20-29	\$60,000 and above	▼	2026-08-28T11:29:27.774+08:00	1	answered
		SG/PR	30-39	\$30,000-\$60,000	▼	2026-08-28T11:29:40.534+08:00	1	answered
		SG/PR	40-49	\$60,000 and above	▼	2026-08-28T11:29:43.024+08:00	1	answered
		SG/PR	30-39	\$30,000-\$60,000	▼	2026-08-28T11:29:57.054+08:00	1	answered
		SG/PR	50-59	\$60,000 and above	▼	2026-08-28T18:31:22.095+08:00	3	answered
		SG/PR	30-39	\$60,000 and above	▼	2026-08-28T11:29:55.256+08:00	1	answered
		SG/PR	30-39	\$60,000 and above	▼	2026-08-28T11:29:54.687+08:00	1	answered
		SG/PR	40-49	\$30,000-\$60,000	▼	2026-08-28T14:38:34.408+08:00	2	answered
		SG/PR	20-29	\$60,000 and above	▼	2026-08-28T11:30:22.801+08:00	1	answered
		SG/PR	30-39	\$60,000 and above	▼	2026-08-28T11:30:26.201+08:00	1	answered
		SG/PR	30-39	\$60,000 and above	▼	2026-08-28T18:16:15.092+08:00	3	answered
		SG/PR	30-39	\$60,000 and above	▼	2026-08-28T11:30:58.372+08:00	1	answered
		SG/PR	20-29	\$30,000-\$60,000	▼	2026-08-28T18:14:24.967+08:00	3	answered



There are other marketing agencies selling targeted leads. Why should advisors choose Jazz Marketing?



Jazz Marketing targeted leads has 3 competitive advantage

1. Cleaned & Preprocessed Leads

Leads are cleaned and preprocessed before delivery to ensure the contact numbers are in use, scrubbed against dnc.gov.sg

2. AI Pre-Qualification

Our AI assistant contacts prospects first to warm them up before the advisor follows up. Only prospects who answers the AI assistant calls will be passed to advisors. Therefore you will experience a very high pick up rates when contacting these prospects

3. Guaranteed Cases Closed

Selected packages come with a **case-closed guarantee**, giving advisors greater confidence and protection in their lead investment.



Juzz Targeted Leads vs Other Targeted Lead Providers

*More Quality Leads.
More Closed Cases.*



*Better Leads.
A Stronger Tomorrow.*



Lead Exclusivity



Case-Closed
Guarantee



Answer Rate



Price per Lead

JUZZ MARKETING

Targeted Leads



Exclusive leads

(1 campaign = 1 advisor)



Yes

(Selected packages)



High

(Pre-qualified by AI)



From \$2

(Targeted Leads)

OTHER PROVIDERS

Targeted Leads



Often shared with
multiple advisors



Usually not included



Typically low
(Cold and unverified leads)



From **\$0.70 – \$1**
(Varies by provider)



Juzz may cost more per lead, but you get cleaner, pre-qualified leads, higher answer rates and selected packages with case-closed guarantees — giving you greater confidence and a higher return on your investment.

*Terms and conditions apply. Case-closed guarantee is available for selected packages only.

*Grow Your Business
With Quality Leads*



PACKAGE (3) APPOINTMENT SETTINGS

*More Appointments.
More Opportunities.*

We set wealth-sharing session appointments for you using Package 2 Targeted Leads and free-gift opt-in campaigns. Our team contacts the prospects, arranges the date, time and location, and provides the appointment details to you.

You will receive the prospect's name, age, mobile, occupation, date, time and location.

Package Options

Rates

Remarks

3(A) MDRT Achiever Package

50 exclusive appointment settings @ \$3,900 (\$78 per appt setting)
21 years old and above with min \$30,000/year income

\$3,900

Guarantee min 3 cases closed
Target 10 cases closed

3(B) COURT of Table Achiever Package

100 exclusive appointment settings @ \$7,500 (\$75 per appt setting)
21 years old and above with min \$30,000/year income

\$7,500

Guarantee min 6 cases closed
Target 20 cases closed
(You save \$600)

3(C) TOP of Table Achiever Package

300 exclusive appointment settings @ \$21,600 (\$72 per appt setting)
21 years old and above with min \$30,000/year income

\$21,600

Guarantee min 9 cases closed
Target 20 cases closed
(You save \$3,600)



Usually for 3 cases closed, advisors will target a commission of

\$10,000.



**More Appointments.
More Conversations.
More Closed Cases.**



Important to Know

These are appointment settings and **not guaranteed meet ups.**
The prospects have agreed to meet to discuss about insurance/investments, but they are not necessarily ready to purchase or expressing interest in any specific product.



Your Effort Matters

Advisors are expected to put in their best efforts, understand the prospect's needs and conduct an appropriate sales consultation to achieve the best results.



Our Support

We provide quality appointment settings with key prospect details (name, age, mobile, occupation, date, time and location) so you can focus on meeting and closing.



What is my projected return on marketing investment for **Package (3) Appointment Settings**?

*More Appointments.
More Opportunities.*

- ✓ Around **80%** of financial advisors who took our packages in 2025 were able to achieve at least an average **20% meeting/show-up rate** and **30% closing rate**.
- ✓ Financial advisors are expected to put in their **best efforts** and apply 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 **show-up rates, meeting performance and closing rates**.

Normal Case Scenario (Based on average performance)



50

Appointment Settings
(exclusive appts)



10

Prospects Met
(20% meeting/show-up rate)



3

Cases Closed
(30% closing rate)



Approx.

\$10,000 Commission *

Good Case Scenario (With higher meeting/show-up rate)



50

Appointment Settings
(exclusive appts)



35

Prospects Met
(70% meeting/show-up rate)



10

Cases Closed
(~30% closing rate)



**Higher
Commission Potential ***

Key Takeaways



These are appointment settings, **not guaranteed meet-ups**.



Results depend on the **advisor's efforts**, follow-up and sales strategies.



We provide guidance and **sharing sessions** to help you improve your meeting and closing rates.



More Appointments. More Conversations. More Closed Cases.
Turn quality opportunities into real results with Juzz Marketing.

JUZZ
MARKETING

Your
Growth
Partner.

*Actual commission may vary depending on product mix, case size and individual performance.

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

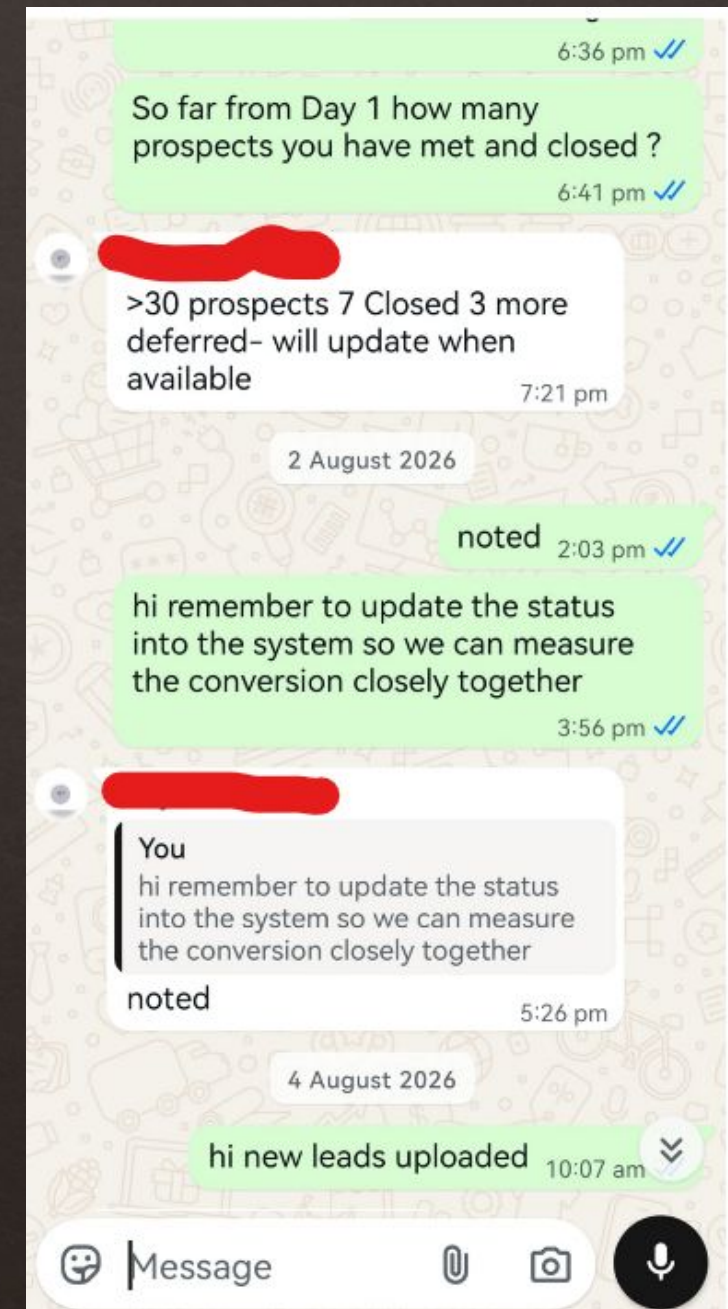


Desmond (not his real name), a 40-year-old financial advisor who was struggling with his production and was close to being terminated by his company

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 Settings

Two different approaches. You choose what works for *you*.

*Same Goal.
Different Approach.*



What you get

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



Our focus

Quality appointment opportunities and closed-case outcomes for our advisor partners.



Your success

We provide a sharing session and practical support to help you improve meeting/show-up rates and closing performance.

Feature	JUZZ MARKETING More Appointments. More Closed Cases.	OTHER PROVIDER (e.g. Paid Turn-Up Model)
 Exclusive Appointment Settings	 Yes (1 campaign = 1 advisor)	 May not be exclusive (usually shared with multiple advisors)
 Case-Closed Guarantee	 Yes (minimum number of cases)	 No guarantee
 Rate per Appointment Setting	From \$72 – \$78 per appointment setting	Approx. \$350 per appointment
 Guaranteed Show-Up / Meeting	 No (Appointment settings only. Not guaranteed meet-ups)	 Yes (Prospects are paid/incentivised to attend)
 Prospects Paid to Attend	 No (We do not pay prospects just to turn up)	 Yes (Prospects are paid/incentivised to attend)
 Our Approach	Focus on genuine prospects and closed-case outcomes	Focus on paid turn-up volume (meetings may be lower intent)



**Real Opportunities.
Real Results.**

Partner with Jazz Marketing and grow your business the right way.



Key Takeaway

Juzz focuses on genuine appointment opportunities and closed-case outcomes — without paying prospects simply to turn up.

PACKAGE 4: WALKWAY FLYER DISTRIBUTION

Maximum visibility for advisors through MRT & shopping mall hand-to-hand flyer distribution.

REAL
PEOPLE
REAL
OPPORTUNITIES

*Conversations
Create
Opportunities*

PEOPLE
PLANS
PROGRESS
A BRIGHTER
TOMORROW



➤ Shops
➤ Food
➤ More Possibilities

A
BRIGHTER
FINANCIAL
TOMORROW
FOR A
BETTER YOU

UpgradeLifestyle

UpgradeLifestyle

A BRIGHTER
FINANCIAL
TOMORROW
STARTS HERE

A BRIGHTER
FINANCIAL
TOMORROW
STARTS HERE



“ A lot of smart people are online now.
Why compete?

Sun Tze says: attack the weak and avoid what is strong. ”

SAME STREETS,
BRIGHTER TOMORROWS.

*Upgrade
Lives
Together*



Package Pricing

- 10,000 flyers — \$1,388
- 100,000 flyers — \$13,880
- 1,000,000 flyers — \$138,880



10 High-Traffic Areas

Jurong East • Orchard • Yishun • Raffles Place • City Hall
Boon Lay • Clementi • Woodlands • Ang Mo Kio • Sengkang



Ideal For Advisors

- Personal branding
- Financial review campaigns
- Retirement / protection awareness
- Seminars, roadshows & QR lead capture



Why Juzz Walkway Distribution?

- AI-assisted monitoring for better tracking & accountability
- Trained distributors for active hand-to-hand distribution
- High-traffic MRT & shopping mall areas



Best For

- Maximum public exposure
- Offline brand awareness
- More flyer reach, QR scans and enquiries



Best choice if you want more people in Singapore
to notice your brand.



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 Lightning 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 Thunder 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. Why should I purchase recruitment leads from Juzz 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 Thunder 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?



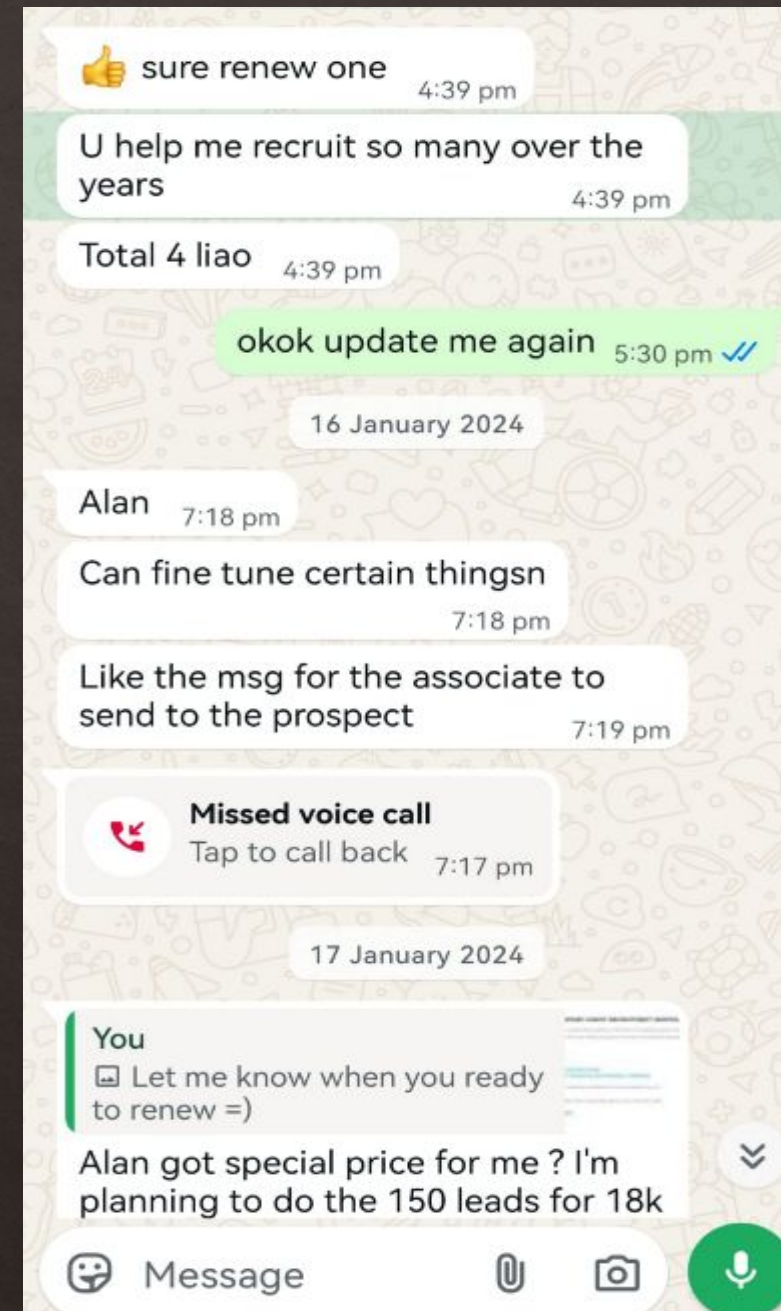
Our recruitment interview settings are exclusive as candidates will only be send to one leader at a time. The candidates are also not incentified to go for interview. Therefore, the recruitment conversion is higher.

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 Leads

	JUZZ	OTHERS
PROS Exclusive Recruitment Rate Candidates Incentified Rates	✓ High No \$180	✗ Low Yes \$350
CONS Guarantee Turn up	✗	✓

Juzz AI Personal Branding Platform

All-in-One Solution for Financial Advisors & Agency Leaders

Build Trust. Stay Visible. Attract Prospects. Grow Your Team.

Turn Your
Personal Brand Into
a Growth Engine!

Package
6G



AI Content Generation

AI-generated advisor branding videos & images ready to use



Content Planning & Scheduling

Plan and schedule content consistently across multiple platforms



Multi-Platform Publishing

Post to Instagram, Facebook, TikTok, YouTube, LinkedIn, X and more



Performance Analytics

Track reach, engagement, enquiries and growth insights



Content Optimisation

AI recommendations for better branding, visibility and response



Team & Approval Workflow

Manage advisor or agency content with approval process

Plan	 Advisor Starter Build Awareness	 Advisor Growth Grow Your Brand	 Advisor Authority Scale Your Influence
Guaranteed Views / Month	100,000	300,000	1,000,000
Price (1 Month)	S\$1,488	S\$3,488	S\$8,888
Price (3 Months)	S\$4,288	S\$9,988	S\$25,288
Price (6 Months)	S\$7,988	S\$18,888	S\$47,988
Price (12 Months)	S\$14,988	S\$35,588	S\$90,688
Purpose	Build advisor awareness	Generate more leads	Scale brand & agency growth



What's Included



AI-generated content



Scheduled posting



Performance optimisation



Multi-platform distribution



Monthly report & insights

Juzz MARKETING
AI • CONTENT • RESULTS



More Visibility



Lower Content Costs



More Leads



Better Recruitment



Future-Ready Brand

Let's Grow Together →

Contact us today for a **FREE** consultation!

Why Businesses Choose Juzz AI Social Media Platform

Juzz | SOCIAL MEDIA
FOR A BRIGHTER
TOMORROW

More than social media management — one platform to create, schedule, publish, analyse and optimise content at scale.

Typical S\$500/Month Social Media Service

From
S\$500/Month

-  Creates and posts content
-  Basic account management
-  May run ads
-  Usually no guaranteed views
-  Limited testing and optimisation
-  Results can be unclear

Good for basic social media presence

Juzz AI Social Media Platform

 Optional Managed Growth Plans
Guaranteed Views Available

-  AI content generation at scale
-  Content planning & scheduling
-  Multi-platform publishing
-  Performance dashboard & optimisation
-  Team approval workflow
-  Optional managed growth plans: 100K / 300K / 1,000,000 views
-  Designed to generate more visibility, leads and sales



Best for businesses that want a platform + measurable growth results

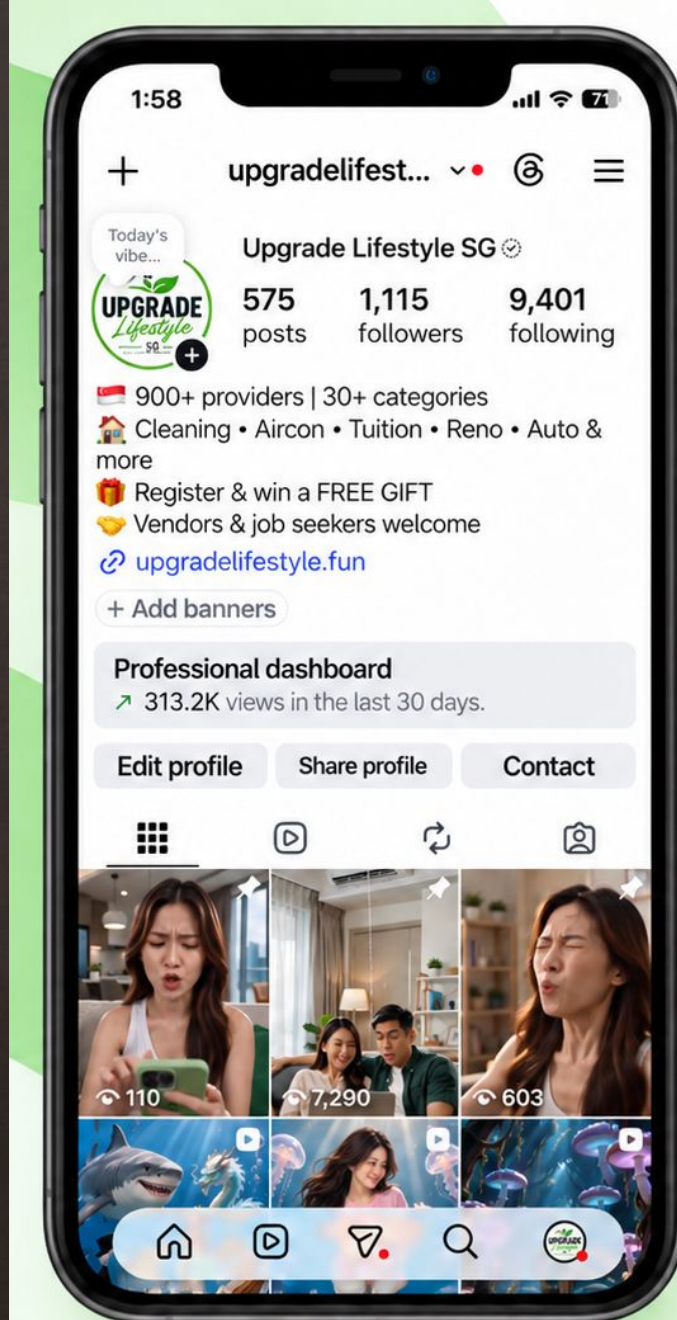
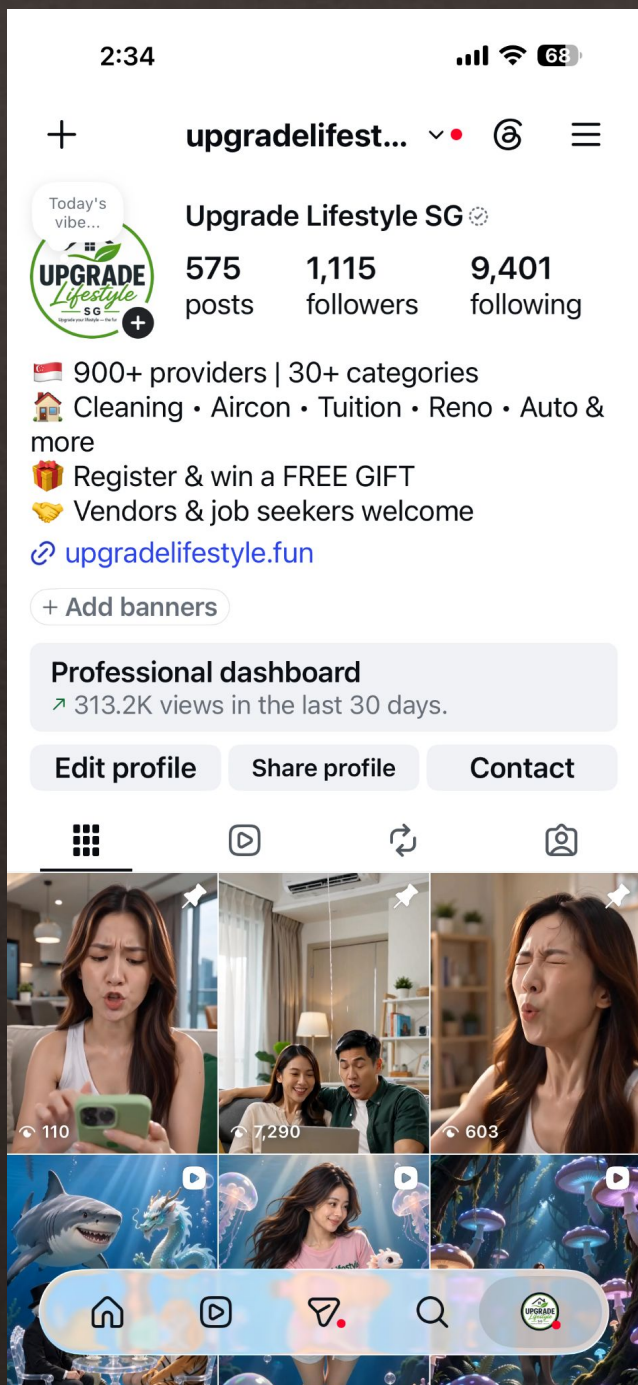
Feature	Typical S\$500/Month Service	Juzz AI Social Media Platform
 AI Content Generation	✗ Limited / No	✓ Yes
 Scheduling & Publishing	✗ Basic	✓ Multi-platform
 Approval Workflow	✗ Usually No	✓ Yes
 Analytics & Optimisation	✗ Basic	✓ Advanced
 Scalability	✗ Limited	✓ High
 Managed Growth Plans	✗ Usually No	✓ Optional
 Business Outcome Focus	✗ Content management	✓ Views, leads & sales

Juzz helps businesses go beyond content posting —
we focus on **platform-driven growth, visibility and measurable outcomes.**

Let's Grow Together →

Platform subscription with optional
managed growth plans.

IDEAS
CONTENT
AUDIENCE
GROWTH
TOGETHER



1,000+ Followers. 313,000+ Views in 30 Days.

15 Aug 2026 – 13 Sep 2026

UpgradeLifestyle is already reaching audiences far beyond its follower base, with over **313,000** views generated in the past 30 days.



Next milestone:

1,000,000 views per month.



Growing Community



More Opportunities for Providers



Stronger Brand Awareness



A Better Everyday Life

BETTER SERVICES
A BRIGHTER EVERYDAY



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