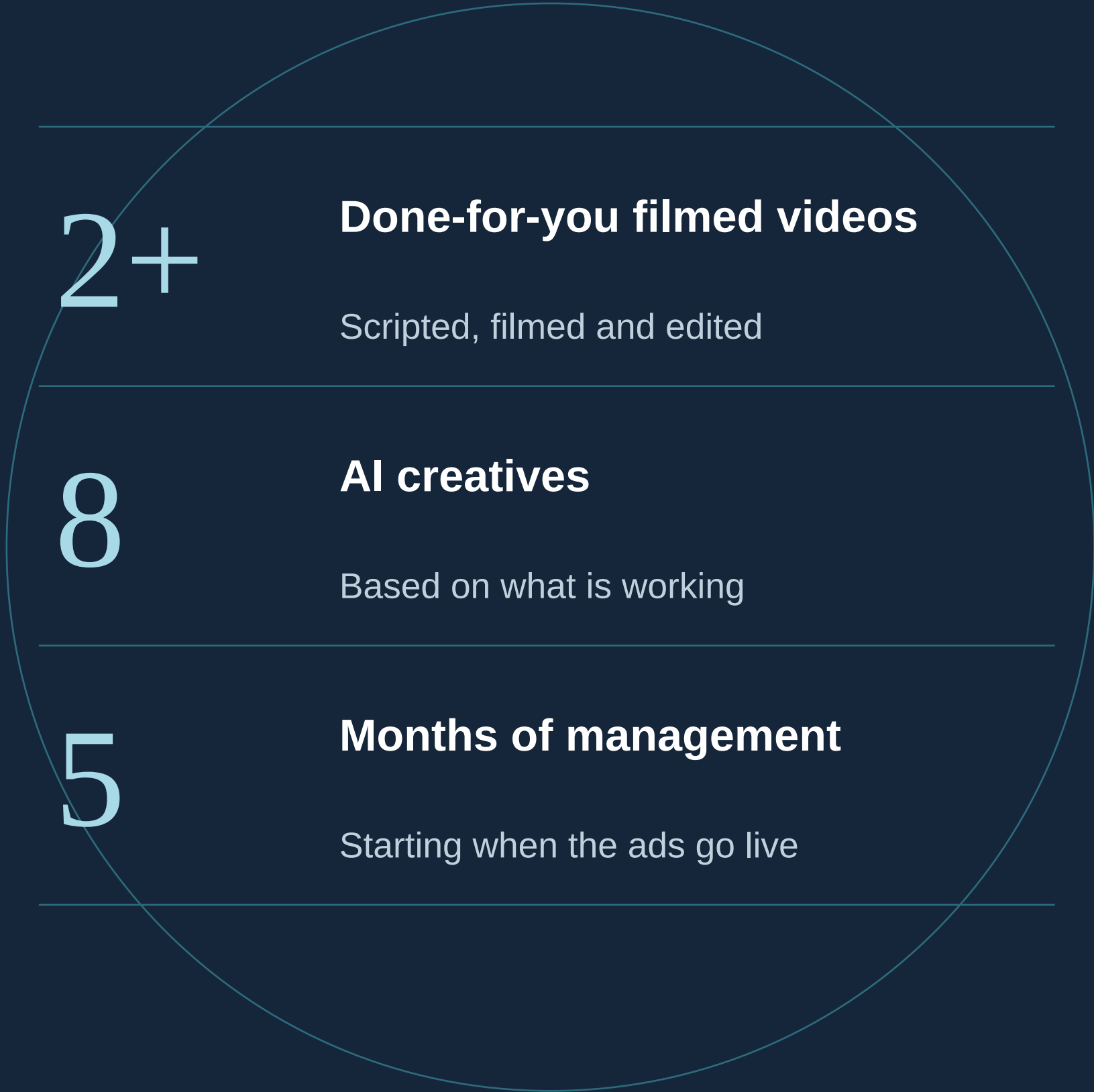


Your CPF campaign. Built. Launched. *Managed.*

The creative, follow-up and team setup
behind your next campaign.

\$9,500

Service fee. Ad spend is separate.



WHAT YOUR INVESTMENT COVERS

The campaign. *And the system behind it.*

01 · Creative production

**2+ filmed videos
+ 8 AI creatives**

A CPF-focused starting set for your ads.

02 · Compliance support

**Prepare, submit
and revise**

We handle the back-and-forth for review.

03 · WhatsApp follow-up

**AI appointment
setter**

Prompt follow-up when new leads arrive.

04 · Team access

**CRM app
+ round robin**

Leads assigned across your team.

05 · Adviser introductions

**An intro PDF
for every member**

Show prospects who they will meet.

06 · Ongoing management

**Five months
of campaign work**

Monitor, improve and refresh creatives.

A strong start.

More than one way to get attention.

2+

Filmed videos

Done for you, from script to edit

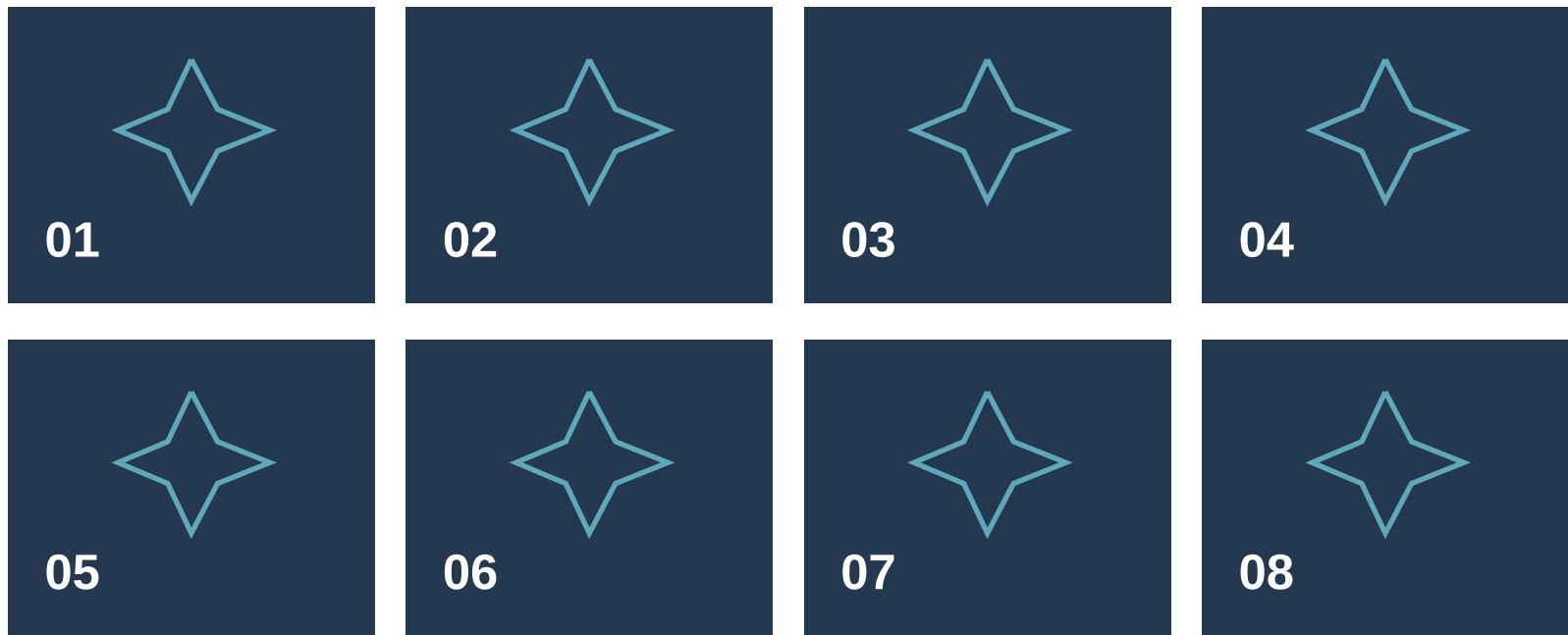
We write the scripts, work through compliance feedback, arrange filming and edit the final videos.

- ✓ CPF is the main campaign topic
- ✓ At least two finished videos

8

AI creatives

Created for your campaign



Angles and formats informed by current campaign performance.

Your ad budget needs *options to test.*

10+

Starting assets across filmed
videos and AI creatives.

The aim is to find the CPF messages
that attract the right prospects for your
team.

01 Test different angles

One message may work better than another. A wider set gives us more to learn from.

02 Match the campaign to the budget

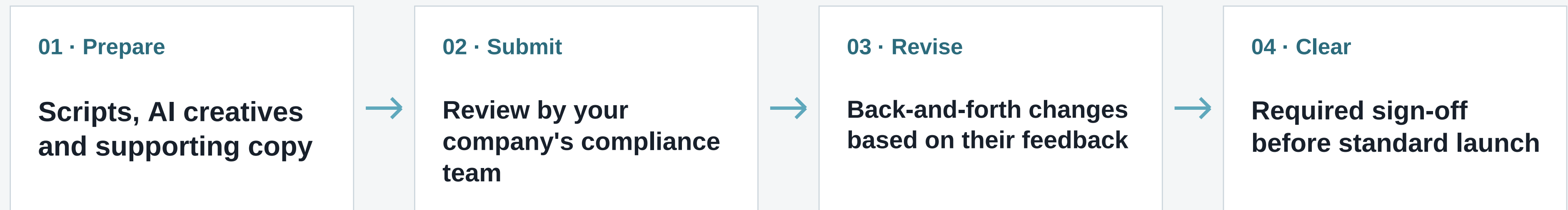
We use your agreed ad spend and team needs to plan what to run.

03 Refresh what stops working

When a creative underperforms, the team develops fresh ideas to test.

Built for compliance. *Revised through review.*

We prepare the materials, handle feedback and make the required changes.

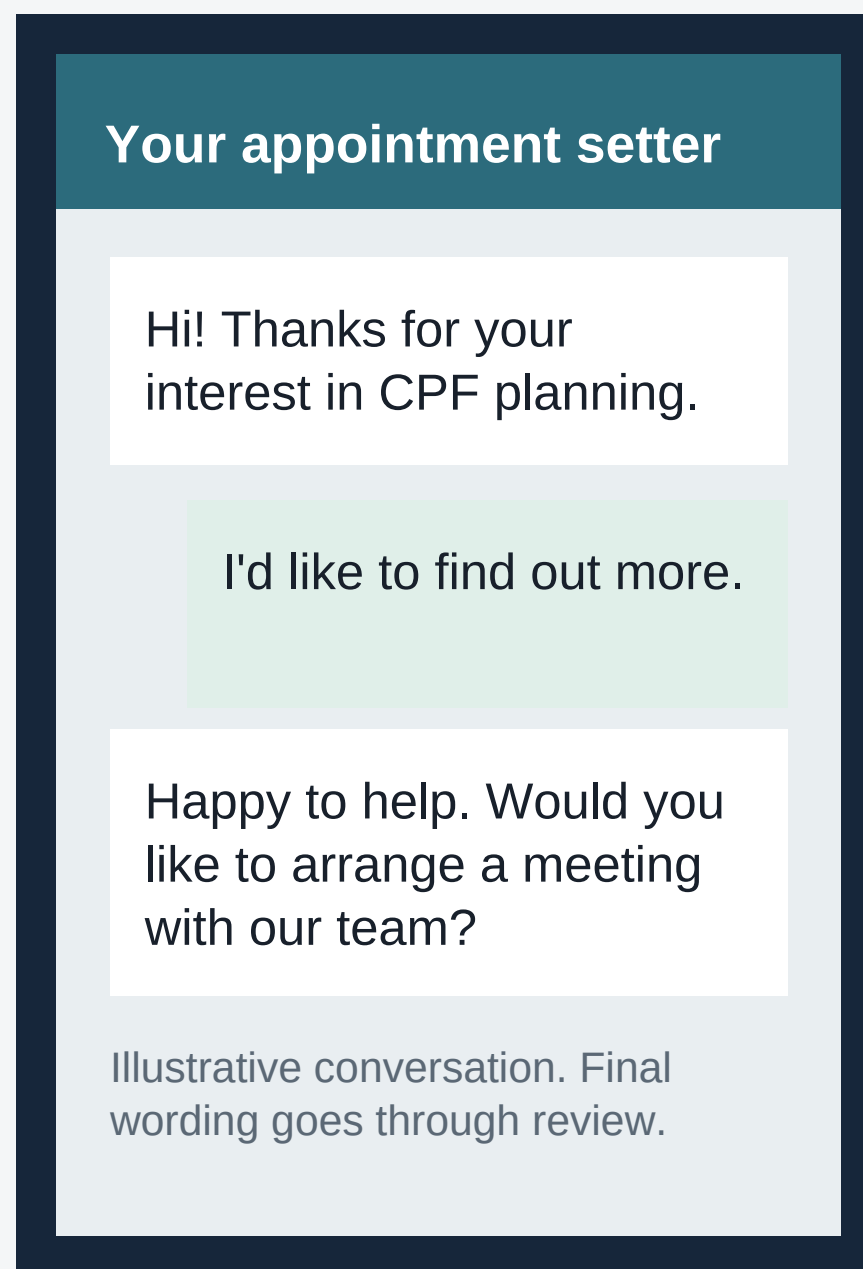


The review covers the ads and relevant lead-facing materials, including WhatsApp copy and adviser intro PDFs.

We manage the process. Final approval rests with your company. Review timing depends on their response and the revisions needed.

A new lead comes in.

The follow-up starts.



01 Prompt first response

The WhatsApp AI setter is set up to follow up as soon as a new lead enters the system.

02 Keep the conversation moving

It follows up with interested prospects and helps move them toward an appointment.

03 Your team can see the handover

The lead and conversation are available in the CRM app for the assigned adviser.

Leads reach your team.

Without manual allocation.

One place to manage leads

Your team gets CRM app access to view assigned leads, see conversations and keep track of follow-up.

Lead to WhatsApp to Appointment

The campaign and follow-up are connected to the team's lead workflow.

Automatic round robin

New leads rotate across the team members in the agreed setup.

A Adviser A · Lead 1

B Adviser B · Lead 2

C Adviser C · Lead 3

Then back to the first adviser. Illustration only; the actual team is configured during setup.

Help prospects know *who they are meeting.*



Meet your
adviser.

A personal introduction
before the first meeting.

ADVISER INTRO · PDF

One intro deck for every team member

Each adviser gets a PDF introduction that helps a prospect understand who they are and who they will meet.

-
- ✓ Personalised to the adviser
 - ✓ Easy to share before a meeting
 - ✓ Prepared for compliance review

We collect your team's profiles and approved details during setup.

ALREADY DELIVERED · YOUR STARTING FOUNDATION

The foundation is in place.

Now we build the campaign.

ALREADY DELIVERED

CPF training

Your team has already received the CPF training as part of this engagement.

ALREADY DELIVERED

Deep dive

The deep dive is complete. It gives us the context for the scripts and campaign approach.

Payment starts the next phase: scripts, compliance review, creative production and the lead setup.

Build first.

Your five months start at launch.

Payment starts the preparation. The service clock starts when the first ads go live.

Weeks 1-2	Weeks 3-4 · Estimate	After script clearance	About 1 week after filming
01	02	03	04
Scripts and preparation	Compliance back-and-forth	Filming gets started	Edit and prepare to launch
Write the scripts and prepare the campaign materials and team setup.	Submit, collect feedback and revise. Final timing depends on review.	Arrange the filming date once scripts are cleared and everyone is available.	Edit the videos and secure any required final asset sign-off before launch.
Ads live. Lead generation begins. WhatsApp follow-up, CRM and round robin are ready for the launch.			Month 1

Want to start *lead generation sooner?*

We can discuss starting with proven AI videos while your custom videos are being prepared.

Standard route

Review, film, then launch.

Follow the full timeline: scripts, compliance feedback, filming, editing and required final sign-off.

Best suited to a launch with all campaign materials cleared first.

Optional early route · After payment

Existing AI videos first.

If you are comfortable proceeding before the usual compliance review, we can use proven AI videos to aim for an earlier launch.

These early-start ads would not yet be cleared by your compliance team for this campaign. This option is available only where your firm's policies and required approvals permit.

Your custom videos still follow the full review and production process. If ads launch early, the five-month service period starts from that first launch.

The first creatives *are the starting point.*

Our team keeps working on the campaign after the ads go live.

01

Monitor

Review ad performance and how the leads move through follow-up.



02

Learn

Use campaign data and your team's lead feedback to guide changes.



03

Improve

Adjust the campaign and develop more creatives when performance calls for it.

If a creative is not working, we do not stop at the initial set. The team comes up with more ideas and creatives to test during the service period.

New and revised campaign materials follow the required compliance process. We work to improve results; leads, appointments and sales are not guaranteed.

YOUR NEXT STEP

A complete CPF campaign.
A clear path to launch.

\$9,500

Service fee. Ad spend is separate.

Production and setup first.
Five months of management from launch.

Confirm your preferred launch route with Fahim.

Prepared for Gidman & team · 4 October 2026

01 Choose your launch route

Standard compliance-first launch, or discuss the conditional early-start option.

02 Payment gets preparation started

We begin the scripts, campaign materials and team setup.

03 Launch, then keep improving

Your five-month service period begins when the first ads go live.