

The £5,000,000 Executive Escape

How Masterplan Wealth Broke the Founder's Trap to Achieve
£5M in AUM Growth & Guaranteed Revenue.

Stuck in the Zero Guaranteed ROI Trap

Masterplan Wealth was experiencing the Founder's Trap firsthand. They were struggling to secure highly qualified leads for their premium pension and retirement planning services. Their marketing efforts were chaotic, relying on fragmented tools and unpredictable external agencies. There was no clear, scalable path to guaranteed growth.

The Risk & Accountability Gap:

The client bore 100% of the financial risk with unpredictable lead quality and an inefficient conversion rate, forcing the founder to waste valuable time managing the broken process.



The Solution: Zorvan AI Prototype

The prototype system eliminated fragmentation by deploying integrated AI executive roles designed for a single purpose: Guaranteed Revenue generation without the chaos.



AI CMO Function

Focused on high-precision lead generation, deploying AI-crafted campaigns across social media to attract high-net-worth individuals interested in retirement.



AI Head of Sales

Deployed conversion-driven landing pages and interactive quizzes that educate the prospect while ruthlessly filtering intent and capability.



AI Setter

Automated scheduling tools instantly qualify and book high-intent leads directly onto the advisor's calendar, completely eliminating manual follow-up.

Step 1: The "Say Yes" Hook

Low-Barrier Acquisition

To break through the noise, we abandoned generic financial advice ads and deployed highly targeted Facebook Ads where the Ideal Customer Profile (ICP) spends their time.

- ✓ **The Core Hook:** "Check if you qualify to retire at 55."
- ✓ This addressed the prospect's ultimate desire immediately, creating a low-barrier offer that was incredibly easy to say "yes" to.
- ✓ Drastically lowered Cost-Per-Click by utilising an interactive, curiosity-driven angle rather than a hard corporate sell.
- ✓ Captured high-intent traffic ready to enter the qualification phase.

The image displays two screenshots of Facebook advertisements for 'My Retirement Masterplan'. Both ads are sponsored and feature a video player. The top ad shows a man in a white shirt and tie celebrating in an office, with a play button overlay. The bottom ad shows a woman and a man looking at a screen that displays a retirement calculator interface with a play button overlay. The text on the ads reads: 'The State Pension age is rising to 68, but you could retire in your 50s by getting to know your pension funds.' Below the video players, there is a 'FORM' section with the text 'It takes less than a minute via SMS t...' and a 'Learn more' button. The bottom ad also shows engagement metrics: 18 reactions (18 likes, 0 dislikes), 61 comments, and 7 shares.

Step 2: The Authority Quiz Funnel

High-Converting Landing Page

Traffic from the ads was directed not to a generic corporate homepage, but to a streamlined, friction-free landing page designed explicitly to convert curiosity into committed action.

The page removed all distractions, focusing solely on initiating the interactive retirement assessment process.

What is Retirement AI-Calculator?

Retirement Calculator is a useful free tool, that helps you discover your pension situation and plan for a secure and comfortable retirement. It can also suggest the best-matched certified advisors near you based on your conditions, AI powered.

Calculate



What do we offer?



FCA Authorised and FSCS Protected

Our Financial Planners are highly qualified and are authorised by the Financial Conduct Authority (FCA). This means that their advice is backed up and protected by the Financial Services Compensation Scheme (FSCS)



Building Trust & Awareness

Instead of a standard "contact us" form, prospects engaged with a dynamic quiz. This mechanism built authority and deep awareness of their own financial gaps.

By providing immediate micro-value, prospects became highly willing to exchange their verified email and phone number to speak with an expert.



Retirement AI-Calculator

Could you retire in your 50s, whilst being able to afford the life that you always dreamt of?



No personal details required to find out

Step 3: Ruthless AI Qualification



Sorry, but we don't think we can help you.

Based on your answers, we don't believe you are eligible for a review.

If you believe you entered some information incorrectly, you can simply go back and retry our assessment.

Go back



Filtering for the Ideal Client

Volume is useless without quality. Our AI Appointment Setter dynamically evaluated leads in real-time based on the client's strict ideal criteria.

The Qualification Logic:



Accepted: Individuals explicitly confirming a pension pot of £50k or greater.



Excluded: Non-target demographics, specifically filtering out public sector workers (Military, NHS staff) whose pensions did not align with the firm's specific advisory model.

Wrong number 78 Opportunities \$5,850.00	Out of criteria 492 Opportunities \$38,325.00	Booked appointment 403 Opportunities \$330,150.00	Received documents 35 Opportunities \$211,100.00
Tony - Philippa Mary Stuart Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Tony - Calvin Vickers Opportunity Source: Facebook Lead Form Opportunity Value: \$1,500.00	Tony Higgins Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Helen Yorston Opportunity Source: Facebook Lead Form Opportunity Value: \$1,500.00
Tony - Joanna Poggiani Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Tony - Mohammed Siddiq Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Linda Sheridan Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Phil Stephens Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00
Tony - Carol Heeley Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Tony - Vijay Chana Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Nigel Robbins Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Tony - Surrinder. Singh Banger Opportunity Source: Facebook Lead Form Opportunity Value: \$1,500.00
Tony - Debbie Purkiss Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Tony - William Walker Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Philippa Williams Opportunity Source: Facebook Lead Form Opportunity Value: \$75.00	Tony - Shirley Jones Opportunity Source: Facebook Lead Form Opportunity Value: \$1,500.00

Step 4: Frictionless Booking

The Ultimate Zero-Risk Filter

The final step of the AI journey ensured the founder only spent time closing, not chasing.

For Qualified Leads: They were seamlessly pushed to an automated scheduling calendar. The AI booked them directly into the advisor's diary, appending all quiz data for a perfectly warmed-up sales conversation.

For Disqualified Leads: The AI delivered a polite, helpful dismissal message—protecting the advisor's valuable time while maintaining a pristine, professional brand reputation.

<input type="checkbox"/>	Contact Name	Phone	Email	Tags
<input type="checkbox"/>	MN Michelle Nigel Bryant	07207 011001	b...om	
<input type="checkbox"/>	SG Sarah Gannon		s...	disqualified - all public pension
<input type="checkbox"/>	BS Buhle Skybirth		b...om	appointment-booked +1
<input type="checkbox"/>	RD Roselyn Drummond		r...mail.com	full-report-requested
<input type="checkbox"/>	TP Twane Paich		l...om	appointment-booked +1
<input type="checkbox"/>	SC Stanford Carolus		s...l.com	appointment-booked +1
<input type="checkbox"/>	TN Tlali Nkoe		n...	appointment-booked +2
<input type="checkbox"/>	BR Behzad Rahmzadeh		b...	
<input type="checkbox"/>	SR Sadegh Rahmati		r...com	full-report-requested
<input type="checkbox"/>	TM Tshenolo Mokwena		t...l.com	appointment-booked +2
<input type="checkbox"/>	VC Vanessa Cope		v...	disqualified - all public pension
<input type="checkbox"/>	CH Christina Holland		c...	disqualified - all public pension
<input type="checkbox"/>	AC Anita Callan	07207 011001	a...om	disqualified - all public pension

The Guaranteed Result

Your cost per on-facebook leads is 46% lower than similar ad sets

Having a lower cost per on-facebook leads suggests that you are spending less on your ad sets to achieve campaign objectives compared to similar ad sets from similar businesses.

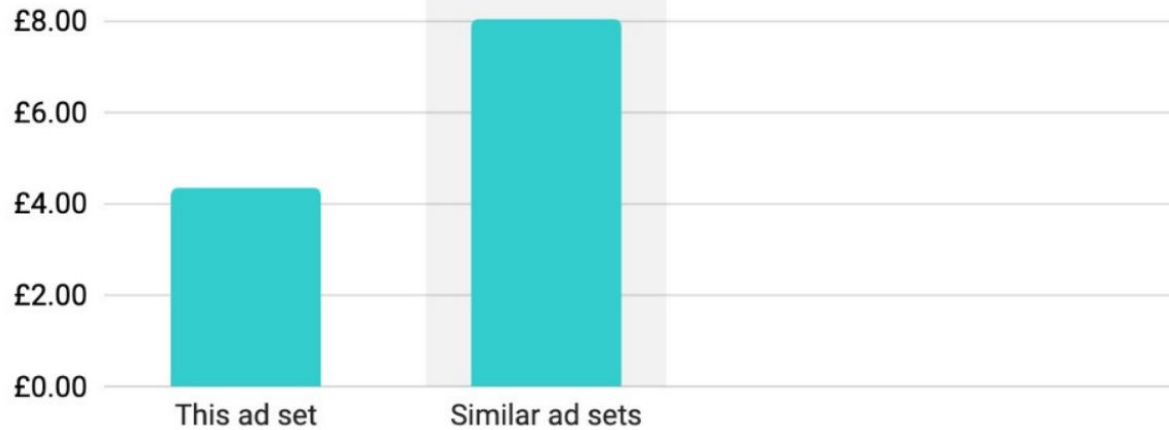
This ad set
£4.35

Similar peer ad sets
£8.05

Cost per on-facebook leads of this ad set compared to the median cost per on-facebook leads for similar ad sets run by your peers.

[Learn more](#)

Cost per on-facebook leads compared to similar ad sets



	Leads (Form)	Per lead (form)	Daily average					
<input type="checkbox"/> <input checked="" type="checkbox"/> 49 - 63 Southwest	74	£7.19	£30.00	£531.86	80,769	30,191	2 Jul 2023-Ongoing	
<input type="checkbox"/> <input checked="" type="checkbox"/> 49 - 63 cruise - National Unpublished edits	497	£5.64	£60.00	£2,803.64	580,227	137,157	14 May 2023-Ongoing	
<input type="checkbox"/> <input checked="" type="checkbox"/> 49 - 63 cruise - Tony	22	£5.49	£15.00	£120.87	21,145	10,785	4 May 2023-Ongoing	
<input type="checkbox"/> <input checked="" type="checkbox"/> 49 - 63 Frequent Intl travellers - Tony	16	£6.44	£15.00	£103.02	17,662	8,285	4 May 2023-Ongoing	
<input type="checkbox"/> <input checked="" type="checkbox"/> 49 - 63 Wide audience - Instant Form - MR...	90	£7.26	£80.00	£653.33	81,315	35,270	11 Apr 2023-Ongoing	

Results from 19 ad sets ⓘ

20 Dec 20

Performance ▾ Breakdown ▾

Reach ↑↓ Schedule ↑↓

186	53,832	14 Aug 2023-Ongoing
199	80,068	11 Aug 2023-Ongoing
153	18,956	11 Aug 2023-Ongoing
165	6,013	10 Aug 2023-Ongoing
315	19,317	28 Jul 2023-Ongoing
140	19,506	19 Jul 2023-Ongoing

The Guaranteed Result

£5M

Increase in AUM

The direct result of the precise AI CMO and Conversion strategy
deployed over just 40 days..

£140k+

New Bottom-Line Revenue

Proven and secured by the direct conversion of highly qualified,
AI-vetted leads into paid clients.

Before vs. After: The Operational Escape

Core KPI Focus	Before (The Founder's Trap)	After (SWAI Prototype)
Financial Risk	100% of risk borne by the founder. Unpredictable marketing costs.	Risk eliminated by focusing strictly on conversion-driven investment.
Lead Quality & Operational Efficiency	Ineffective acquisition. Manual tracking, fragmented tools, slow reporting.	Generated 200+ qualified leads for high-ticket services. Real-time integrated reporting.
Conversion Rate	Consistently low, due to non-optimized funnels and manual friction.	Conversion Rate highly optimized by the automated AI Head of Sales funnel.

Executive Verification



The result-driven lead generation solution provided by the system completely paved the way for Masterplan Wealth's rapid growth and AUM expansion.

JOE YOUNG, MASTERPLAN WEALTH

Stop Managing Chaos. Start Leading.

Replacing chaos with a single, accountable AI executive is how you scale.

Ready to see your £5,000,000 escape plan?