* Jerry Cooper, representing a Wealth Advisor Magazine, is meeting with Wil and Harold from Hull Tactical US, an ETF company, to discuss creating a marketing strategy and campaign to promote the HTUS ETF product.
* The agency has developed an AI-powered model and database of information about HTUS that can be used to engage with and educate financial advisors about the product.
* The goal is to create a marketing campaign, including email blasts, that will drive financial advisors to buy a significant amount (e.g. 700 shares) of the HTUS ETF.
* The agency proposes creating a customized, AI-powered marketing model and campaign for HTUS in exchange for a commitment to purchase several email blasts from the agency.
* Key points of discussion include compliance considerations, recommended language and calls-to-action, and leveraging the existing high open rates of HTUS's email marketing.
* Overall, the agency is proposing a comprehensive marketing strategy and AI engagement model to help drive significant AUM inflows to the HTUS ETF

Key points:

* The Wealth Advisor has developed an AI model to educate financial advisors and self-directed investors on the HTUS ETF, with the goal of driving significant inflows.
* The model leverages the firm's database of HTUS materials and aims to provide advisors with answers to common questions, overcome objections, and motivate advisors and self-directed investors to purchase ideally 700 shares of the HTUS ETF
* The marketing firm proposes a series of 3-4 custom emails to be sent to the HTUS audience, which would be optimized by their AI model and marketing team to maximize engagement and buying activity.
* There is discussion around compliance considerations, creating an "implementation guide", and tracking the results of the email campaign to measure its effectiveness.