

Funnel Update – Add the Two Free Guides (Sign-up Required)

Page: paramountfgllc.com/lp/annuity-funnel (GoDaddy Airo site editor)

Do this before switching on the paused Demand Gen ads. Both ads point to this page.

Goal: visitors must enter their name, phone number, and email before they can download either PDF. The page's existing form already collects all three, so the guides use that form.

Step 1 – Upload the two PDFs

In Airo, go to Website > Media (or Files) and upload:

- Roth_Conversion_Liquidity_Matrix.pdf
- Legacy_Transfer_Framework.pdf

Copy each file's link for Step 3. Don't link to these files anywhere on the public page itself. They should only appear after someone submits the form.

Step 2 – Add the guides section

Placement: directly below the "Learn Before You Decide" video section, above "Why a Fixed Indexed Annuity?".

Layout: two side-by-side cards on desktop, stacked on mobile, in the same white card style as the video section.

Eyebrow: Free one-page guides

Heading: Two Questions to Answer Before You Convert or Pass On an IRA

Intro: Plain-English, one page each. Enter your name, phone, and email to get both.

Card 1

- Title: Roth Conversion & Liquidity Matrix
- Text: Converting a large IRA to a Roth? See how much outside cash the tax may take at the 22%, 24%, 32%, and 35% brackets, and how paying from the account compares in a hypothetical example.
- Button: Get the free Roth Matrix → scrolls to the form at the top of the page

Card 2

- Title: Legacy Transfer Framework

- Text: Leaving your kids an IRA? See how the 10-year rule for inherited IRAs works, a hypothetical traditional-vs-Roth comparison for heirs, and a five-step timeline.
- Button: Get the free Legacy Framework → scrolls to the form at the top of the page

Small print under the section: Educational only. Not tax, legal, or investment advice. Examples are hypothetical.

Step 3 – Deliver the PDFs only after the form is submitted

Make all three form fields required: Full Name, Phone Number, Email Address.

Then use whichever your Airo form settings allow:

Option A – Thank-you page (preferred). Create a new page, /lp/guides-thank-you, hidden from the menu and set to "noindex" if Airo allows it. In the form settings, set the after-submit action to redirect to that page. Page content:

- Heading: You're all set. Your free guides are ready.
- Button 1: Download the Roth Conversion & Liquidity Matrix (PDF) → Roth PDF link
- Button 2: Download the Legacy Transfer Framework (PDF) → Legacy PDF link
- Line: Want a second set of eyes on your own numbers? Book a free strategy call → https://calendly.com/pmount/free-strategy-call?utm_source=landing&utm_medium=thankyou

Option B – Success message. If the form can't redirect, put the same two download links and the Calendly link in the form's success message.

Step 4 – Form consent text

The current consent text already covers emails and phone calls. Make one change: replace "Paramount Financial Group, LLC" with "Paramount Financial Group". Leave the rest of the wording as is.

Step 5 – Prompt for the Airo AI editor (optional)

On the /lp/annuity-funnel page, add a new section directly below the "Learn Before You Decide" video section. Eyebrow: "Free one-page guides". Heading: "Two Questions to Answer Before You Convert or Pass On an IRA". Intro: "Plain-English, one page each. Enter your name, phone, and email to get both." Add two side-by-side cards (stacked on mobile) matching the video card style. Card 1 title "Roth Conversion & Liquidity Matrix", text "Converting a large IRA to a Roth? See how much outside cash the tax may take at the 22%, 24%, 32%, and 35% brackets, and how paying from the account compares in a hypothetical example.", button "Get the free Roth Matrix" that scrolls to the lead form at the top of the page. Card 2 title "Legacy Transfer Framework", text "Leaving your kids an IRA? See how the 10-year rule for inherited IRAs works, a hypothetical traditional-vs-Roth comparison for heirs, and a five-step timeline.", button "Get the free Legacy Framework" that scrolls to the same lead form. Add small print: "Educational only. Not tax, legal, or investment advice. Examples are hypothetical." Make Full Name, Phone Number, and Email Address required on the lead form. Create a hidden page /lp/guides-thank-you with the heading "You're all set. Your free guides are ready.", a button "Download the Roth Conversion & Liquidity Matrix (PDF)" linking to [ROTH PDF LINK], a button "Download the Legacy Transfer Framework (PDF)" linking to [LEGACY PDF LINK], and the line "Want a second set of eyes on your own numbers? Book a free strategy call" linking to <https://calendly.com/pmount/free-strategy-call>. Set the lead form to redirect to /lp/guides-thank-you after submission. In the lead form's consent text, change "Paramount Financial Group, LLC" to "Paramount Financial Group". Do not change anything else.

Step 6 – Check before launch

- On your phone, tap a "Get the free..." button. It should jump to the form.
- Try submitting with the phone number blank. It should refuse.
- Submit with real details. You should land on the thank-you page (or see the success message), and both PDFs should open.
- Confirm the test lead arrived wherever Airo sends form submissions.
- Then the paused Demand Gen ads are ready to review and switch on.

Note: anyone who has the direct PDF link can still open the file. That's normal for a website without a members area. Keeping the links off the public page stops nearly everyone from skipping the form.