

The Annuity Opportunity Discovery Process - 5 steps

1.

Always ask questions- Ask your client about employment and their previous employment. Always be probing! When the opportunity arises to ask what they do for a living, ask the questions. Like how long they have been there? What did they do before? When do they plan to retire?

2.

Follow and execute the ATMS- (Mortgage & Final Expense)

Mortgage ATM pages 9 & 14, FEX ATM pages 7 & 13, if used properly and in EVERY HOME, this will help you earn a GOLD MINE!

If MONEY is FOUND continue to bullet point 3.....

3.

Plant the SEED!- Now that you have discovered the money, make sure your client knows Insurance companies do more than just protect lives, homes, land & cars. Make sure they know there is an insurance product that PROTECTS THEIR MONEY. Give them a Growth With-out Risk book (In NAA Store) and ask them to read it. Let them know that American's put \$104 BILLION dollars into this insurance product in 2015, UP from \$97 billion in 2014. This is how many Americans are protecting their hard earned RETIREMENT MONEY your client may want to consider it too.

By the way, you might find they already have an ANNUITY, GREAT!! Our product might be a better option! Still go to the next step and offer a policy review to do a COMPARISON!

4.

BAM- FAM- (book a meeting from a meeting) Make sure to leave the clients home with the (Figure) of the amount of money in need of protection. If possible get a statement of where they have their funds. Make sure the client knows you will check with your senior business partners and your insurance companies to see if there is a viable option for them. Let them you will come back next week SAME DAY SAME TIME to follow-up and show them their options.

5.

Send a letter-During this next week confer with carriers and your up-line about the best options for client. Keep the client in the mindset you have created by sending them a letter, first thanking them for their time and reminding them of the next appointment. Add something to the letter about the book you gave them. Like, "I hope you are enjoying the book I gave you". Include info about a website that can give them further insight, www.checksandbalances.tv

I also like to send them a link in regards to the RMD law.

<http://www.irs.gov/Retirement-Plans/Retirement-Plans-FAQs-regarding-Required-Minimum-Distributions>