



PLEASE NOTE: INTERNET ACCESS IS REQUIRED TO OPEN LINKS

MINE YOUR BOOK

Mine your existing book of business for hidden gems.

STRIKE GOLD WITH NEW CLIENTS

Refine your prospecting skills with new clients.



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PROSPECTING PLAYBOOK

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BENEFICIARY REVIEW

- Client Workbook
- Training Guide

PROSPECTING RESOURCES

- Who Do You Know?
- Financial Wellness Checkup Tri-fold
- Life Doesn't Stand Still-Flyer
- Policy Review Training

TOOLS:

- Detailed life insurance needs analysis calculator
- Basic life insurance calculator
- Inforce illustration training



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MARKETING:

- Social Media calendar
- Consumer Videos
- Graphics
- Social media posts for new clients

TOOLS:

- Skills of Fact Finding
- Cash & Income Needs Analysis
- Financial Fitness Workbook for Clients
- Consumer Prospecting Worksheet
- Life insurance for income replacement

SALES CONCEPTS:

- Individual vs employer life insurance
- Determine the right amount of insurance
- Lifetime of income



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