AdvancedSales

Helping Professionals Attract and Retain
Affluent & Business-Owner Clients

www.aig.com/advancedsales

AIG

MEET THE ADVANCED SALES TEAM

For your next advanced sales case, help is here. Contact us to get the answers you need to bring in your next big case.

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Vice President, Advanced Sales
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- Tax and Legislative Updates
- Advanced Case Design and Strategies
- Experienced in Tax, Estate, Financial, Retirement, and Charitable Planning
- Professional Speaker and Educator

DAN SPENCE, CLU, CHFC
Director, Advanced Sales
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- Case Consulting
- Web or In-Person Presentations
- Product and Illustration Expertise
- Premium Financing

BRAD PRICE, CLU, CHFC, EA
Director, Advanced Sales
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- Product and Sales Expertise
- Business Owner Markets
- CPA Collaboration
- Web or In-Person Presentations

CALL US TOLL FREE
1 (855) 323-6923

EMAIL US TODAY
ADVANCEDSALES@AIG.COM

SUBJECT MATTER EXPERTISE

The Advanced Sales Team is prepared to provide you with innovative solutions in the following subjects:

FOR INDIVIDUALS AND FAMILIES

- Estate Planning
- Estate Tax Planning
- Estate Equalization
- Wills and Trusts
- Irrevocable Life Insurance Trusts
- Annual/Lifetime Gifting
- Family Limited Partnerships and LLCs
- Other Wealth Transfers
- Generation Skipping Planning
- Income Tax Strategies
- Retirement Planning
- Retirement Distribution Planning
- Charitable Giving and Trusts
- Private Financing
- Premium Financing

FOR BUSINESS OWNERS AND THEIR BUSINESSES

- Business Continuity
- Key Person Planning
- Executive Benefits
- Deferred Compensation Plans/SERPs
- Split-Dollar Programs

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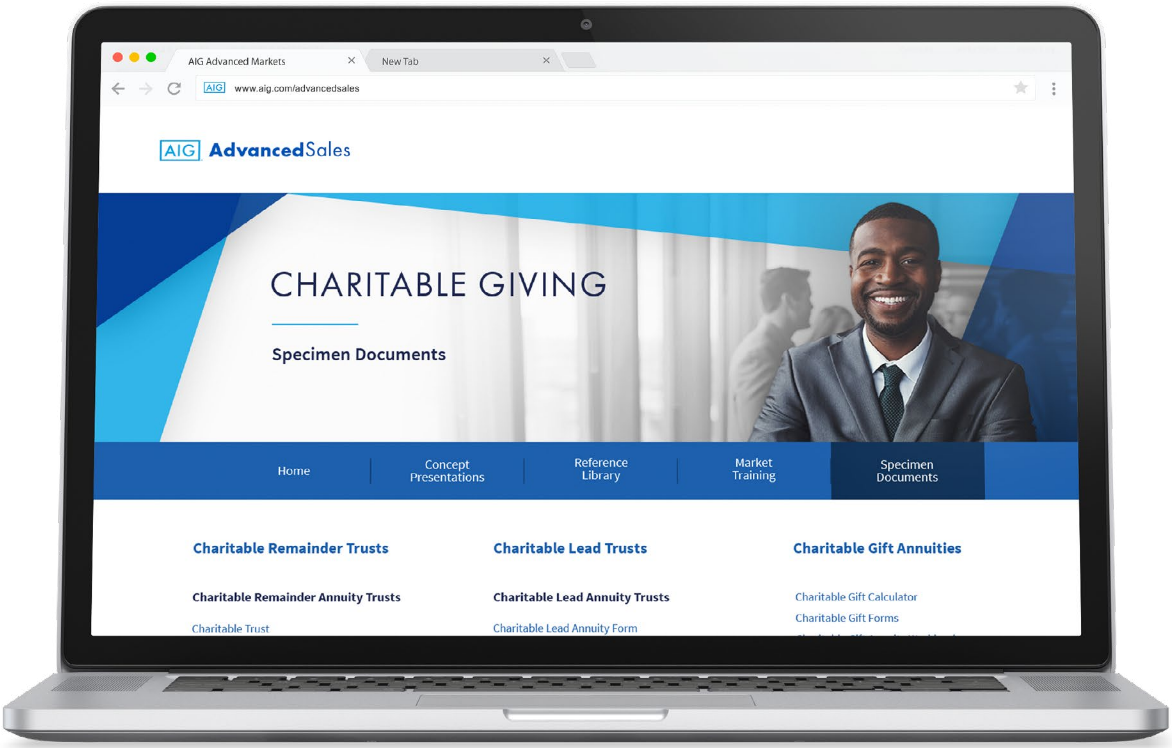
EXPLORE THE ADVANCED SALES WEB PORTAL*

Where you will find thousands of pages of consumer- and producer-facing information.



CONCEPT PRESENTATIONS

From multi-page presentations to one-pagers to calculators, find consumer-approved materials designed to educate and motivate.

RESEARCH LIBRARY

Exhaustive and searchable library of detailed information regarding tax law, complex concepts and other information useful for case design.

MARKET TRAINING

Whether you are looking to learn about advanced markets, brush up on your subject matter expertise or acquire CE credit, the Portal provides a variety of self-paced training options.

SPECIMEN DOCUMENTS

A substantial repository of sample legal documents and agreements – such as buy-sells, split dollar, trusts, powers of attorney – to be used with a client's advisors (e.g., CPAs, attorneys).

ADDITIONAL INFORMATION

Look in this section for regular installments of OnTopic, our bulletin on current planning subjects. We will also provide key product and underwriting information that impacts Advanced Markets.

No login required, simply go to www.aig.com/AdvancedSales

*Advanced Sales website updated regularly. Image of website shown may differ from actual website.

PROFESSIONAL SERVICES

Our experts have many years of service in advanced sales, allowing us to provide you a wide array of assistance.

DO YOU HAVE A CASE?

When selling life insurance and annuities in the advanced markets, you may find yourself in need of our help. Reach out to our team when a specific insurance case requires the following services:

- Advanced Concept Review
- Case Consultation and Preparation
- Create/Assemble Custom Presentations
- Cover Letter Development
- Charitable Gifting Plan Review
- Buy-Sell Plan Review
- Key Person Plan Review
- Specimen Documents Provided
- Financial Justification

DO YOU NEED TRAINING?

Would you like an advanced sales overview or a deep dive into a specific topic? We have training solutions for you:

- Self-paced Web Training
- Webinar Training
- In-person Training
- Business Development Institute
- Tax Law Change Presentations
- Other & Regulatory Dev. Presentations

AIG BUSINESS DEVELOPMENT INSTITUTE

Offering resources suitable for various types of life insurance professionals and organizations: BGAs, Agencies, Producers, etc.

PROSPECTING

Remove primary obstacles by learning how to identify and qualify an unlimited number of the right prospects. No cold-calling required. Define the ideal prospect and gain institutional wisdom. All while knowing what to say to them to engage them in planning ahead.

MEETING MANAGEMENT

Run your meeting like a professional. Overcome obstacles and reluctance while prioritizing their goals. Discuss what they want, Discover what they have done about it, Reveal what still needs to be done; leading them to React and take action.

CONVERSATIONAL COMPETENCE

Establish your credibility and competence by understanding small business planning. Learn about the different types of entities, forms of succession plans, valuing a key person and executive benefits. Learn to ask the right questions to engage your client.

CLOSING & SERVICING THE SALE

Assist in reprioritizing so the client can change what they are doing for a better result. Systematically reveal the necessary actions for their plans to unfold as pictured. Now, encourage them to continue the process with their next priority and to warm up your list.

GRADUATE MODULES

Learn specific, powerful and creative strategies to engage a business owner in the "planning-ahead" process by implementing meaningful, targeted approaches. Also, gain greater competence in advanced sales strategies and concepts.

No login required, simply go to www.aig.com/BDI

WHY WE ARE DIFFERENT?

We understand the sales process. Our AdvancedSalets team offers you assistance communicating with Agents, Attorneys, C.P.A.s, etc.

WHY WAIT? We want to help you find the solution to your advanced sales questions. Reach one of our team members directly

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