

HOW TO GAIN CLIENT INTEREST IN ANNUITIES



STEP 1

BE A PROBLEM SOLVER

Clients want their problems solved in the best way. Plain and simple.



STEP 2

START THE CONVERSATION WITH A SIMPLE QUESTION THAT EVOKES AN EMOTIONAL RESPONSE.

- Have you evaluated your retirement finances recently?
- If you retired right now, are you confident in your finances?
- What are your biggest concerns about your finances in retirement?



STEP 3

POSITION YOURSELF AND THE PRODUCTS THE RIGHT WAY.

In the end, it's how you position yourself and the products that increase sales.

BE THE AUTHORITY

- Know the products and their sales trends
- Understand what makes each product unique
- Stay current on the latest annuity updates and regulations

PRODUCT NEUTRALITY

- Create the best possible plan using impartial approach
- Don't push products that aren't a great fit
- Discuss scenarios with different products so clients sense neutrality

BETTER BENEFITS

- Highlight the tax-saving benefits
- Describe how stocks, bonds, and mutual funds gains are all taxed
- Show annuity payouts have much less subject to tax
- Explain how more tax-free income reduces longevity risk

BUY INCOME & INVEST THE REST

- Demonstrate how a portion of their portfolio can be guaranteed lifetime income
- Invest the rest more aggressively to meet other financial goals
- This can leave a legacy or achieve other financial goals

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