

# National Brokerage Blue Print for Success: “Annuity Practice Intelligence System”



## National Brokerage Exclusive Annuity Training:

- ✓ Weekly - FREE hour long Annuity Webinar
- ✓ Concept selling and techniques (No boring home office training here)
- ✓ Advanced sales concepts
- ✓ Point of Sale Presentations

## Annuity Prospecting Pre-Approach Material:

- ✓ E-mail marketing campaigns
- ✓ Appointment setting scripts
- ✓ Prospect/Client Annuity Web presentations
- ✓ Client Letters
- ✓ Prospect/Client Educational Material

## Annuity point of Sales Support:

### ✓ 1<sup>st</sup> Appointment Material

- Detail Client Profiler/Fundamental Annuity Questionnaire
- Money-Income Presentation
- Helpful point of sale material

### ✓ Second Appointment Presentation/Closing Presentation

- Client Concern-Solution Presentation
- Product recommendation and quotes
- Strength of Annuity Piece
- Application, Brochures, and everything to write the business

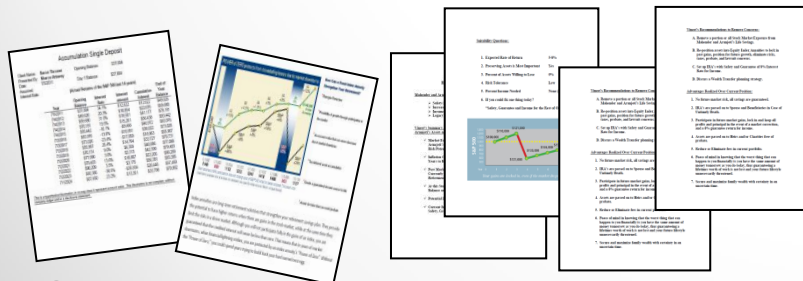


## Administrative and Back office support:

- ✓ Annuity Application review
- ✓ Case follow-up and communication
- ✓ Annual Review and post-sale recommendations
- ✓ Everything from Submission to commission

## Lead Programs:

- ✓ Exclusive Organic Annuity Leads
- ✓ Annuity Appointment Setting Program
- ✓ Annuity Direct Mail Program
- ✓ Multiple Life Lead Programs



**Online Agent Portal:** Complete access to all the before mentioned Info