

Quick-reference prospecting guide

FIXED INDEXED ANNUITIES

1 Get involved in your community

In addition to meeting people who could benefit from your services, your name will be connected with groups making a positive influence.

2 Utilize in-house resources

Branch personnel such as tellers are excellent sources of prospect referrals. Our Branch referral kit (K-AD-REFERRALS) is available as a training resource to help them identify and refer prospects to you.

3 Plan an event

Holding a seminar helps establish you as an authority, and the people who attend will have self-selected as having an interest in the topic.

4 Customize your mix

Develop a strategy for using different methods to contact prospects: email, social media, direct mail, phone. Track the results and make adjustments to optimize results. For tips on incorporating technology into your business, see page 13 of our Prospecting guide.

5 Make a connection

Before you meet with clients, use LinkedIn or Google to learn a little about them: shared interests, hobbies or groups that could also be sources for referrals.

6 Fine-tune your referral requests

As you interact with new clients, begin laying the groundwork for referrals. Low-pressure techniques include mentioning that you always have time to help people with something as important as planning for the future. As your relationship progresses, consider making more formal requests for referrals at important milestones, such as when a client thanks you for work you've done.

7 Strengthen your referral follow-through

Let people know that you've contacted the referrals they've passed along — consider sending a hand-written note or a small gift as a thank-you. This extra step lets them know you appreciate their referral and increases the likelihood they'll send more connections your way.



Conversation starters

1. What kind of retirement do you envision?
2. When do you want to retire?
3. How do you feel about your current level of income? What income do you expect in retirement?
4. What's your perception of the stock market? How willing are you to invest in it?
5. Would you be interested in a tool that can help with Social Security filing decisions?
6. Do you have a sense for what your health care costs will be in retirement?
7. Do you have a plan for how you'll pay for health care and potential long-term care?
8. Have you thought about how you'd like to plan for your legacy?

Give us a call for more resources.

National Sales Desk: 1-800-321-6064
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