SELLING ANNUITIES ... EASY AS 1, 2, 3 !!

Sometimes all that is required is the correct language to get the conversation started. Here's some suggestions that will help the client to connect emotionally with their own long-term goals, and to connect to you.

LEVINSON & ASSOCIATES

Life & Annuity Brokerage since 1972

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4 WAYS

To Open The "Annuity Door"

Introduction:

- "Have you ever had a retirement income check-up?"
- "Could you afford to retire tomorrow? If not, when? How much would you need?"
- "What concerns do you have about income during retirement?"

Lifetime Income:

- "Are you concerned about having enough income to last throughout your retirement?"
- "What is most important to your retirement - income you can't outlive or growth of your retirement savings?"
- "Have you made arrangements for lifetime income during your retirement years?"
- "Some people could live for a very long time and risk outliving their retirement income. Would you like to know more about an income you cannot outlive?"

Performance:

- "Are you happy with the rate of return you are getting on your savings at the bank?"
- "How satisfied are you with the performance of your retirement savings?"
- "How would you like to increase your retirement savings without setting aside more?"
- "Do you really believe that the bank is the only place where you can safely accumulate money?"
- "Are you maximizing contributions and deferrals with your current retirement plan?"

Taxes:

- "Do you prefer to pay yourself or Uncle Sam first?"
- "If I could show you how to utilize tax deferral on a portion of your retirement savings, would you be interested?"
- "When do you want to stop paying taxes on the gains from your retirement savings?"
- "Do you realize there is an insurance product that offers tax-deferred interest accumulation?"
- "Are you interested in possibly reducing your current taxes?"
- "Would you like to see how to get tax-deferral in your non IRA retirement savings?"
- "A SPDA offers you the power of tax-deferred compound interest: you earn interest on the premium, interest on interest on the previously credited interest and interest on the money that you would have paid in taxes."