

Not confident in your ability to lead conversations about life insurance? Here's a few conversation starters to tee-up their life insurance and start reviewing in-force policies

TEE UP SCRIPT OPTION A

I'm here to help you meet your objectives. Performing a review can help determine if your policy is performing according to your expectations and continues to meet your financial objectives.

There are many factors that can impact a policy's performance. That's why it's important to review both your objectives and the mechanics of your policy. Would you like to know if your policy is still the most competitive strategy for your needs?

If so, we can do this for you.

TEE UP SCRIPT OPTION B

There are several factors that can affect life insurance coverage. We can help you determine if your policy is performing according to your expectations and continues to meet your financial objectives.

At my firm, we take a macro approach to policy management. We evaluate your policy's makeup to determine if it still meets your needs. We review funding, favorable tax treatments or the cost of insurance. We then look at comparable products to determine if the policy's performance is competitive and continues to be the best option for you.

Let's make sure your policy is still the most competitive product for your needs. We just need a copy of your statement to get started.