**SECTION 4: LOCK IT DOWN**



**SECURE THE SALE**

One thing I take pride in is making the right recommendations to my clients and making sure that you're satisfied with your program. I’d like you to tell me in your own words- What did we just do here today?

*(This will ensure policy persistence-have the clients to repeat back to you and use prompts if needed)*

How much coverage did we put in place (or how many months of mortgage payments)? What is that coverage for?
How much will it cost monthly?
Approximately when do we expect the first payment to draft?

*(set your application so it drafts upon approval when possible, and let them know if they see the premium draft within the next few days it’s a great sign because that’s the last step before approval!)*

Why did we choose this program?
What questions do you have for me before we wrap up?
The program we chose today-do you have peace of mind that this will help your family?

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I'm going to work with the insurance company to get your policy approved and I’ll give you a call or a text within 48 hours with the status of your application. Even if we’re still waiting for news, I’ll check in with you to give you an update. Do you prefer text or phone?

I’ll let you know where you stand and what's going on and what the insurance company needs from you, if anything.

*TIP: Ask them what way do they prefer to be communicated with, via text, via email, via a phone call. Write that down and let them know that you prefer text.*

When the policy is approved, it will be mailed to you directly. If you have any questions on it we can arrange a zoom meeting or phone call to review. We will also be doing an annual policy review with someone from our member services department.

Also let’s take a minute to save my number in your phone.

*(Having clients save the number ensures that they recognize the number when you call.)*

Contact me anytime for anything. I'm your agent now. If anyone else calls you about life in- surance feel free to give them my number and have them call me. Our company may send you a few more letters in the mail- you can ignore those now that we have a program in place for you.

All right. So I know we discussed a lot today. So guys what I’m going to do is recap every- thing in an email to you.

*TIP: Create a template for this and populate the client’s info so it can be sent out quickly.*

**THE 5 R’s**

***Rugrats - BAMFAM to cover the kids (or do it now!)*
*Retirement - BAMFAM if they can’t afford to lose any of their retirement savings this year*
*Referrals - “Would you have any referrals for me?” That’s what Casey Watkins says!!*  *Recruit - “know anyone who’d like to make an additional $1,000-$2,000 a month?”*  *Replacement - existing coverage? Do a no cost review!***

It was great meeting you folks today. Have a great (afternoon/evening)! Goodbye.  **BONUS:**

*CLICK HERE for a training on entering and American Amicable application (this is the first company you will be contracted with)*

*CLICK HERE for a training on how to guide the client through their electronic signature process with an American Amicable application.*

*CLICK HERE for an amazing audio from one of the founders of Symmetry, Casey Watkins, on how to write $30,000 in 6 days!!! Don’t miss it!!*



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