

Longevity planning

Client profile

Name: _____ Agent code: _____

Email: _____ MGA: _____

Longevity planning is a sales concept that can help your clients prepare for a long, healthy retirement.

Using permanent life insurance to help prepare for a long, healthy retirement

If your clients are...

- 25 to 60 years old
- Middle- to high-income earners
- Concerned about their family’s financial needs if death occurs during working years
- Interested in providing additional financial protection during retirement years
- Have maxed out qualifying benefit programs (or lack a qualified plan)
- Are concerned about extended care costs
- Are concerned about their assets running out
- Are concerned about financial protection if a qualifying illness occurs



... Longevity planning with life insurance can be a good option.

List the names of five clients who fit the above profile.

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N _____	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N _____	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

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Premium amount: _____	Retirement age: _____	_____	_____	_____