

Legacy building

Client profile

Name: _____ Agent code: _____

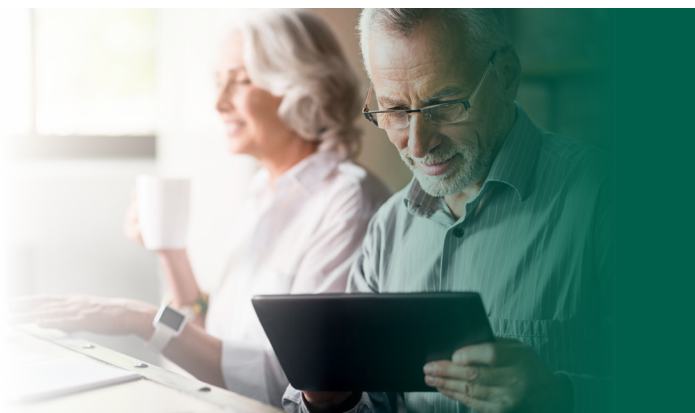
Email: _____ MGA: _____

Legacy building is a sales concept that uses permanent life insurance to help your clients attain death benefit protection and help maximize the assets that are passed along to beneficiaries. It may be one of the most favorable methods to build a legacy.

Help your clients gain financial protection and pass along a legacy

If your clients...

- Are 55-75 years old and have a retirement plan in place
- Need death benefit protection or may have an underperforming life insurance policy that may need review
- Hold funds designated to leave to heirs or children in savings accounts or money market accounts, especially accounts designated as “payable/transfer on death” or POD/TOD
- Have titled assets jointly with heirs
- Have annuities coming out of surrender
- Currently take required minimum distributions (RMDs), but don’t have a current need for the funds



... Legacy building 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: _____	_____	_____	_____

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

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

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

Sammons Financial® is the marketing name for Sammons® Financial Group, Inc.'s member companies, including North American Company for Life and Health Insurance®. Annuities and life insurance are issued by, and product guarantees are solely the responsibility of, North American Company for Life and Health Insurance.