Life

Retirement planning

NORTH AMERICAN®
A Sammons Financial Company

Client profile

Name: ______________________________ **Agent code:** ______________________

Email: ______________________________ **MGA:** ______________________

The retirement planning sales concept uses permanent life insurance to provide clients with death benefit protection while offering the potential to supplement their income during retirement.

Help clients meet their retirement planning needs

If your clients are…

- Ages 30-60
- In need of death benefit protection
- Middle to high income earners
- Concerned about family's financial needs if death occurs during working years
- Looking to supplement retirement income
- Self-employed, member of a partnership, or corporate-employed

… The retirement planning sales concept could be a good fit.

List the names of five clients who fit the above profile and whom you would like to help meet their life insurance needs and financial goals.

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

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