

Key person

Opportunity tracker

Name: _____ **Agent code:** _____

Email: _____ **MGA:** _____

Most companies have a person(s) whose skills are vital to the success of the business. A key person may be an owner, partner, or employee without whom your business would suffer serious consequences.

Key person life insurance could help ensure that all the effort and money invested in a business won't disappear when the unexpected happens.

Do you have clients who could benefit from the life insurance death benefit or cash value potential to:

- Offset the loss of profits due to the death of a key employee
- Recruit and train a qualified replacement
- Protect the company's credit position by reassuring banks and other creditors that the company will have the resources to honor its obligations, even if it loses a key employee
- Provide a financial hedge against a loss in business value

Help ensure continued success of a business by planning for the unexpected.

List the names of five business clients who fit the 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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