

TRANSITION TO STATEMENT ON A SALE

Once again let me congratulate you for making such a wise decision for your family and rest assured you have my commitment in facilitating this for your family as well.

Now that we have taken care of your family's needs upon your passing, it's time to take care of your needs prior to your passing. What I mean by that Mr. Client, is that the only thing scarier than passing away too soon, is living longer than your money. Millions of people are facing the reality of not having enough funds to retire or worse yet, not having enough funds to stay retired. So many of my clients face this same problem and even though I don't specialize myself personally in retirement planning or asset preservation, we at YIG have a division of specialists that do just that. They sit down with our clients and show them how to insure their assets from market volatility and losses, while remaining positioned for gains, all the while protecting your entire principal on a guaranteed basis. What they do is go over your options with you and as you know whenever we look at our options before making a decision we usually make the right choice, it's when we make decisions without going over our options, when we tend to make mistakes. At the end only two things are going to happen, either they'll tell you that you're currently in the best position possible, given your situation and to stay the course, or they are going to show you how to dramatically improve your situation and expedite your retirement goals, either way it will be a positive outcome for you and you will have the best night sleep, knowing that you have met with a professional and either been validated in your previous decisions or have been put back on track to achieving your financial goals. We provide these services to all of our existing clients at no cost. I have had so many of my clients call me and thank me for referring them to our specialist and I know you will too. All I need to set up an appointment for you is a copy of your current statement; Our Specialist will need it to do an analysis on your current positions and review that with you on your appointment.

(Agent sets appointment on the spot for no sooner than two days out, no later than one week out, if client is reluctant to set with the specialist or is still unsure, use Bank Analogy script.)

PHONE

FAX

WEB