



Estate Planning Newsletter

THE NUMBERS GAME

After ten years of success with our highly acclaimed estate planning opportunity, we were more than excited witnessing our exponential growth continue each month in 2021. Even better, January 2022 “knocked” those numbers out of the park. This year will be FANTASTIC!

Here's how we know. We have processed our data to see how and where sales are coming from. There's facts to back up our findings. The American Bar Association hired a firm to conduct a survey and discovered that 71% of the population knew they needed legal help. They also found that what held people back was the fact that people are uncertain about how to determine a good lawyer from a bad one. Further, the cost of getting legal help was a daunting thing for people to have to deal with. As a result, over half said they have no plans to seek legal advice. The other half indicated they were open to seeking help but that doesn't mean they will.

This is where the door of opportunity opens wide for you. It is a fact that the subject of estate planning is one of the most popular topics among people over the age of 50. The pandemic “woke up a sleeping giant” as people experienced sudden life consequences that they never expected much less planned for. The ‘what if’s’ in life became real.

We have the most unique educational sales process that is ideally suited for what you do. By simply reaching out to your current clients and asking “do you realize that the government has a plan for your estate if you don't?” and they will answer yes or no. Regardless, it sets the stage for you to let them know that your firm has invested in the education and software to now be able to assist people where until only recently you weren't able to. It all starts with education. Our professional videos will give you what you need to take it from there. The “Difference between a Will and a Trust” and our “What is Probate” videos are fantastic.

All you do is educate your clients and prospective clients that having their own plan is far better than the government's plan. Once they acknowledge this fact, you show them the Free Trial and how easy it is to complete and while going through the Free Trial you say, “You've acknowledged the fact that having your own plan is the way to go and now here it is. Convenient and through my company it is more than affordable. In fact, it is a small investment versus the government's plan”.

Our numbers prove that licensees who are doing Free Trials are converting them to paid accounts leading to life and annuity sales. Setting a goal to issue 10 Free Trials a week will give you solid feedback on how to improve your process. We have agents that now issue over 40 free trials a month starting with converting 10% to 12% as paid accounts. They work on improving their process and now are converting between 40 to 50%. These are real numbers. The top producers are converting over 80%.

These numbers are so real that we are now focusing our training on this sales process. Everything begins with the question, “do you know that the government has a plan for your estate if you don't?” and flows from there. It is the easiest approach to growing your business you will ever find. Not to mention you will experience more referrals than you could ever get with any insurance plan, annuity or investment product. How do we know?

In a little over 10 years, we are the nation's #1 comprehensive estate planning opportunity exclusively built for professionals like you! You can experience the same success! BTW, big things are coming for you in 2022.