



The Personal Financial Inventory Sales Idea

Using the Personal Financial Inventory at the sales table

Forces you to:

- ✓ Organize clients Assets in Asset Summary
- ✓ Commit to Using an Agenda on 2nd Appointment
- ✓ Uncovers other areas where prospects need help
- ✓ Shows that you are a professional in your approach
- ✓ Makes the intangible- tangible
- ✓ Show this at every appointment
- ✓ Tell your prospect that if something happens to them there is one central piece their loved ones can reach for and know everything is one binder
- ✓ Commits to annual reviews and service meetings
- ✓ Script that goes along with binders
- ✓ Different tabs and the reasons behind them
 - Asset Summary
 - Beneficiary (discussed in the seminar)
 - Newsletters (ongoing info from you to your client)
 - Wills and Trust (do they have one/need one, current)
 - Life Insurance/ Long Term Care
 - Accounts with us/outside of us
- ✓ Using this at the Binder Delivery meeting
 - Delivery bag
 - Binder
 - Gifts
 - Pen for signing Policy Delivery Receipt
 - Using the Referral Guide
- ✓ Ordering information and what to expect when you start offering this service
 - Use with existing clients
 - Use to get referrals
 - Use to close more appointments