

# AGENT GUIDE



WAYS WE EMPOWER FAMILIES:

MORTGAGE PROTECTION, FINAL EXPENSE, LIFE INSURANCE  
& RETIREMENT PROTECTION TO OUR CLIENTS

**Who Are We:**





(Insurance License Here)

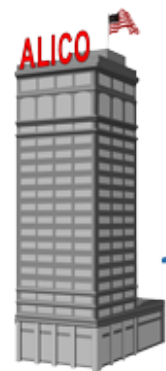
**My License to Help Families:**





**Gerber Life  
Insurance**

**Foresters**  
Financial



**AMERICAN-AMICABLE**  
GROUP OF COMPANIES

***AMERICO***

*& Many More!*

**A Few Companies I Represent:**



I'm going to ask you a few questions so I can shop through  
and figure out which plan will best fit your needs

**Wealth Investigator:**

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# Top 3 Concerns of Our Clients

## Dying Too Soon

Leaving debt/mortgage

Loss of income

Final expenses

## Getting Sick

Becoming unable  
to work

Major health care bills

## Outliving Money

Outlive Savings

Outlive term insurance

Taxes on retirement  
accounts

Cost of nursing home

**Which One Concerns You Most?**

Coverage



Payment

Coverage



Payment

Coverage




Payment

**Your Plan:**



 We'll fill out an application and submit it to the company to see if you get approved

 It normally takes 2-5 business days for the company to make their decision.

 If by chance you do not get approved, we will apply for plan B

 You make your first payment upon issue and future payments on your choice of any day of the month 1-28

 In 5-10 business days, you will receive your policy in the mail, and then we will meet again to go over your policy and to help you in other areas

**What's Next?:**

The last thing we have to do is set up your  
Emergency Contact List

**Emergency Contacts:**

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Please leave me a written 5 Star Google Review



**Your Feedback Helps Other Families!**

