

We want you to achieve your financial goals and dreams. We are here to help you become the best COPS Specialist you can be.

Here are some tips that will help you achieve outstanding success in this business.

- a) Actively pursue each lead you obtain and contact that individual as soon as possible to set an appointment.
- b) Set an appointment with each prospect knowing that “If you can see them, you will sell them.” (confidence)
- c) Tell the “Protection Story” never straying from the focus on family protection, market risk, taxes, and lifetime income.
- d) Make it a concept sale... not a cost sale. (follow the presentation script)
Always remember: “How much I can afford... is how much you will make it worth to me.”
- e) Be prepared for any scenario. Anticipate client situations. Learn to shift gears smoothly and re-set the table with value.
- f) Remember Attitude and control! Leave the client with expectations of what will take place
- g) Stay in touch with clients up through placement of the policy.
- h) Get referrals so that you can make yourself available to more of your target market. Remember that these people tend to be very fraternal in nature. Let them introduce you to their peers. When they find something good, they want to tell others. Encourage them to do so.
- i) Develop a client file. Keep in touch with your clients on no less than an annual basis. (for additional sales opportunities)

