SALES GUIDE

SEQUENCE OF RETURNS RISK

Understanding and effectively managing this risk is paramount to ensuring your clients' financial security during their golden years.

FINANCIAL PROFESSIONAL USE ONLY

:15 Minute Tutorial Video

Learn top sales techniques from a DMI Vice President for positioning Sequence of Returns Risk with your clients.

Then use the customizable PPT deck to present the story to clients and prospects either 1-on-1, or in a group setting like a webinar.

Client Profile & Conversation Starters

Do you see them among your clients and prospects? Get insights into a target audience to address Sequence of Returns Risk and create effective conversations that convert.

CLIENT APPROVED

Customizable PPT Deck

Bring the Sequence of Returns Risk story to your clients and help them make smart decisions.

Just add your logo and branding.

What a Bear Market Means for Retirees

Use this flyer with your clients to walk them through Sequence of Returns Risk or use it as a leave behind.

Just add your contact info and disclosure.

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