



SALES GUIDE

REFINANCE RETIREMENT CAMPAIGN

Take advantage of the Annuity Refinance 'PERFECT STORM' with educational and marketing collateral for you and your clients.

MATERIALS FOR FINANCIAL PROFESSIONAL USE ONLY



Why Refinance Retirement 2-Minute Video

Listen to your AI assistant explain the opportunity and sales concept.

Case Studies & Conversation Starters

Do you see them among your clients and prospects?

1. 'Maximizing Inheritance by Converting a Traditional IRA'
2. 'Enhancing Income Through Strategic Annuity Reviews'
3. 'Seize the Moment to Maximize Retirement Income'

Phone Script

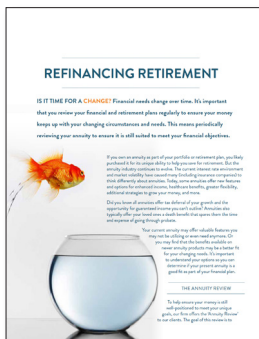
This script gives you the conversational building blocks to discuss the importance of the meeting & key discussion points.

The Perfect Storm Blog

You're no stranger to the changing tides of the market, and right now we're in what many are calling a "perfect storm" for annuity refinancing. But just like the weather, this storm won't last forever.



CLIENT APPROVED COLLATERAL



Refinancing Retirement 2-Page Flyer

This brandable 2-page flyer highlights why having a review is important for your clients.



Refinancing Retirement 4-Page Flyer

Use this customizable flyer with your clients to walk them through the process of conducting a review at a high level.

Just add your contact info and disclosure.

Annuity Review Checklist

Great for first appointments and opening conversations.

Annuity Fact Finder

Get details quickly with this editable pdf.