

Think about this: “I received a call from Agent Joe last week asking for information on being a life agent. Joe was into P&C till recently and decided to get into selling life insurance inspired by a recent personal experience”.

Joe’s nephew passed away at age 42 due to a sudden heart attack and the life insurance of \$350,000 left behind helped his nephew’s wife open a florist’s shop, something she did dreamed of for a long time and continue educating her children aged 5 and 7. Joe said “My nephew was a great guy, too bad he had to leave us all so young. I admire him for thinking about his family and the \$350,000 cannot substitute for his loss, but is certainly a life saver for his family as he had no savings”.

Here are a few pointers we discussed that would make the transition into selling life insurance smoother for him:

1. Getting licensed as a life insurance agent- Joe said he has had a license for the past 5 years, just did not sell life insurance. I just said “Great, the 1<sup>st</sup> requirement is cleared”.
2. Searching for clients- Joe had some concerns such as “Selling life insurance was more difficult than selling P&C”, “Can I use a lead program to get clients?”, “Will you guys give me some kind of training on the products out there?”, etc. I said “As far as training is concerned, we will give you all the help you need. Why are you interested in leads for now as I see you have a ready list to work with? I suggested he contact all previous clients in his database either via email/fax or phone informing them that he can get them life insurance. Also, I suggested pitching life insurance every time he sold a P&C policy henceforth”.

I also advised Joe to mention his inspiring experience with the benefits of a life insurance policy to all his clients.

If you are an agent selling P&C or only health insurance or know of someone who does, do not forget to mention the importance of life insurance to all your clients. It is important to point out that if the client fell on bad times, life insurance policies cannot be touched by creditors. **A good line to use “We are talking here of insuring your home, car, business, etc. Have you thought of insuring the most important asset-yourself?”**

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