

Building Your Business

Build A Formula And Make It Your Own



Steps To Success

Success is easier to achieve when you realize the potential already within yourself. By focusing on what is already in place, you can build your fixed annuity business and be the best you can be.

Follow these steps to create success for yourself and your clients.

1) Use Your Existing Successes.

- Recognize your traits, characteristics and habits that already help you deliver successful results
- Keep doing what works for you and build from there

2) Raise Your Credibility.

- Know your annuity products: features, benefits, and differences
- Have a solid grasp of the market, including information on why consumers are buying annuities
- Be ready to answer your clients' questions

3) Focus On Being Your Best.

- Know your fixed products. Make sure you know the pros and cons of each type of annuity
- Work with fixed annuity carriers that understand your need for consumer-friendly products backed by exceptional service and support
- Be willing to educate the buyer as to which product is best for them

4) Set Your Goals.

- Set ambitious goals for yourself and think of how you can achieve them
- Take yourself to a higher level of sales success

5) Be A Team Player.

- Work with others in your branch for referral success
- Always put your clients' needs first
- Create a team environment and everyone will benefit

By following these five steps, you will find yourself in position to sell annuities successfully.

“Studies are finding that the main reason consumers are not buying an annuity is because no one talked to them about one. After the annuity is explained 75% of the consumers say they would (25%) or might (50%) buy an annuity.”¹

1. Generation X, Generation Y and Fixed Annuities, NAFA Annuity Research Quarterly, Spring 2013.

Annuities are not (a) insured by the FDIC or any federal government agency, (b) deposits of or guaranteed by any bank or credit union and (c) a provision or condition of any bank or credit union activity. Some annuities are subject to investment risk and may lose value. A surrender charge may apply during the surrender period, and a 10% early withdrawal penalty may apply to withdrawals prior to age 59 ½.



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