

The Pension Sales Process

For more information, contact
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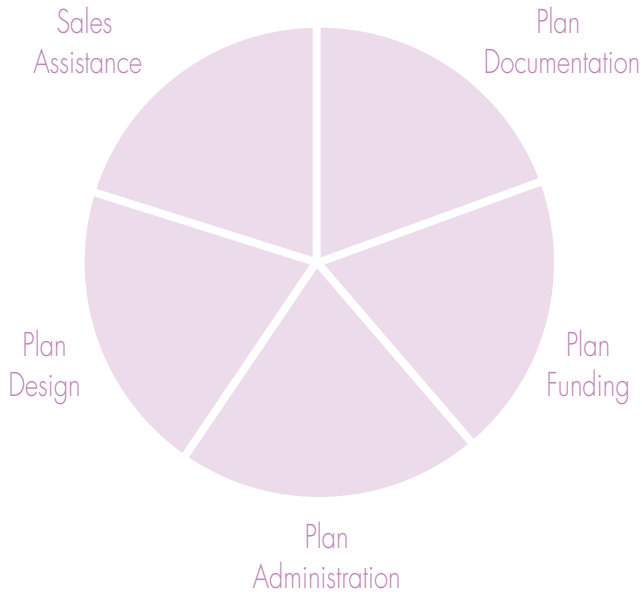
Pension
Sales
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New Dimensions In Pensions

What Is The Pension Sales Process?

At American National, retirement planning is more than just a plan, it's a process. Our Pension Sales Department is here to help you put the pieces together.



Our integrated sales and administrative process is especially attractive in the small business market. Innovative plan design plus a full package of sales and administrative support will help separate you from your competition in the retirement plan market.

The process begins with the receipt of census information from you. Retirement planning specialists then prepare alternative plan designs and these specialists are available to assist you throughout the sales process. Our technical support will insure that you and your prospect understand the features of the proposed plan.

Plan installation, which includes providing a prototype plan document for any type of pension, profit sharing or 401(k) plan is the next step. We supply the other important pieces of a complete pension package as well, including ongoing annual plan administration and various products for funding the plan.

Once the prospect becomes a client, the process remains simple. Annually all we need is an updated employee census and a brief questionnaire completed in order to prepare all of the plan's required reports for the plan sponsor, the participants and the appropriate government agencies.

To start the process we just need a complete census listing all employees' dates of birth, dates of hire, and annual salaries. We can then prepare a FREE LOOK at a specific plan design for your prospect.

You can mail, fax or e-mail your census information to the Pension Sales Department for your FREE PROPOSAL. There also is an interactive proposal request form on our website that allows you to simply fill out the census information and click to send to avoid any paperwork. Just go to www.img.anicoweb.com, scroll down and select the Pension Area and then click on the Online Proposal Request link.

Once a plan is sold, all of the forms you need to set up the plan, along with checklists to guide you through the process, can be found on the website under the link Plan Installation.

Questions:

Call us at 888-909-6504 • Fax us at 409-766-6995

e-mail us at pensionproposals@anico.com

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Census Information From You!***