



Transamerica Incorporating Insurance Planning into Your Practice

The ideal prospect for an insurance review is:

- ❖ Between the ages of 28 and 60
- ❖ Married
- ❖ Has children...possibly grandchildren
- ❖ Strong sense of responsibility
- ❖ Solid income with good growth potential
- ❖ Ideally, a current client

In order to implement an insurance review marketing campaign, your next steps are as follows:

- ❖ Identify prospects that meet the profile
- ❖ On a weekly basis, send 10 approved pre-approach letters requesting appointments
- ❖ Follow up by phone a few days later to schedule meetings
- ❖ Meet with prospects and conduct insurance reviews
- ❖ Utilize the point-of-sale expertise of a Life Consultant where appropriate
- ❖ Close business...help your clients and build your book

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Transamerica Occidental Life Insurance Company
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