

DISCOVERY

M - MOTIVE

Why did you decide to learn about final protection?

- I recently lost someone close or known to me
- I am looking for protection for myself or a family member
- I wish to leave a financial benefit
- I want to be remembered as responsible

E - EMOTION

What impacts or worries you the most?

- Concern for my children
- Peace of mind when planning
- Fear of leaving debts
- Desire to ease the burden on the family

T - TIME

How long have you been thinking about it?

- I've thought about it recently
- Several months ago
- For years

H - HEIR (Beneficiaries)

Who will be your primary beneficiary today? What is his/her name?

- Spouse Son/Daughter Grandchild
 Other: _____

Name:

A - AUTHORITY

Do you make your own decisions or consult with someone else?

- I make my own decisions
- I consult with my partner
- I decide with my family

F - FINANCES

What monthly range seems reasonable to you?

- \$60 \$65 \$65 \$70 \$70 \$75
 Other: _____

NOW I KNOW WHY I'M HERE...

If today I can find an option that fits your budget, is there any reason not to explore it?

"Today's decision eliminates the pressure of that day."