

3 Option Assumptive Close

Client's name, you get all these benefits, a whole life policy protection, peace of mind and me as your agent. And for ...

\$ (face amount) in coverage for only \$ (premium amount)

Select Option

Option 1: \$ _____ for only \$ _____
Option 2: \$ _____ for only \$ _____
Option 3: \$ _____ for only \$ _____

~ Congratulate the client on their selection

~ Ask for a picture of ID to be sent to you then proceed to process and submit application

Congratulations client's name and thank you for allowing me to help you protect you and your family.

Post Close & Branding

How did they feel about everything? _____

Recap: Review their new policy

You are getting a \$ (face amount) coverage for only \$ (premium) it will be coming out of your (bank's name) on the (date) every month.

Your policy is a whole life policy that will never expire as long as the policy is in forced.

(Beneficiary Name) will be the beneficiary of this policy.

Any questions?

Referral

We're here to help families protect what matters most. So, if you know someone who could benefit from our services, please write their name, number and email below. Your referral could be the start of their brighter, and more secure tomorrow!

Name	Phone Number	Email

Give client your name, phone number, and email address (business card)

END OF CONVERSATION