



Sales Process:

IUL Leads

- Call Leads - First Call
 - Read Script and Pivot when needed
 - Push Full Service Financial Firm
 - Set Illustration and Application appointment via Zoom with upline or self (If self-closing)
 - Set Zoom meeting ASAP (Dependent if you have State License)
 - Immediately follow up:
 - Meeting Time
 - Link to Website
- Illustration and Application Meeting
 - Call/Text Reminder both 1 day and 1 hour before meeting
 - Run through illustration
 - Close with application - “Let’s see what you can get approved for - no money due today”
 - Run App and Draft when is best for them