

FAMILY FIRST LIFE FORTUNE IN HOME AGENA

1. Why Was The Form Filled Out?

- Final Expense/Burial Costs?
- Income Replacement/Mortgage Protection ?
- Leverage Legacy?

2. What does it look like for the family if there is no insurance in place?

3. Who am I?

- Field Underwriter- I'm going to help you figure out what you're medically eligible for
- Broker- I work WITH all of the insurance companies, I don't work FOR any of them.
- Non-Captive- I am able to shop around for you with multiple companies

4. Here's what we're going to do today

- 2-3 minutes of health and finance questions
- Based on how you answer those questions, I will make a recommendation
- Then, we will show you some options.
- Once we find an option that makes sense, we will submit a request for coverage to find out what you can qualify for.
- If you do not qualify: We will find a different plan and resubmit for coverage
- If you do qualify: We will have 30 days to adjust up, adjust down, or leave it alone

5. Three Things To Accomplish Today

- a. Make sure you can afford it
- b. Make sure you can qualify
- c. Make sure you understand it

6. Financial/Health Inventory

- Go through the questions
- Who is going to be picking up the pieces?
- Any life insurance currently in place?

7. Show You The Options/Get A Second Opinion From Senior Underwriter

8. See If You Qualify