RESOURCE DOCUMENT

Listed below are a wide variety of selling tools and resources. Some of these will be beneficial for the client, and some are beneficial in helping the agent find the right product for the client.

- **Combo Impairments**: Shows common health issues with our top carrier products for mortgage protection and final expense.
- **Final Expense**: Displays eleven carriers specifically for final expense. (Last updated 2020)
- **Final Expense Conditions:** This document shows what each carrier offers for each condition. This is more comprehensive.
- **Term Condition**: Compares conditions to term products.
- **Social Security Life Expectancy**: This is the U.S. Social Security Administrations life expectancy guide for estimated funeral and burial costs.
- **CRM**: FAQs from FFL about the CRM
- **Comp Guide:** Family First Life Carrier Comp Guide

Client Resources: These can be used to complete the sale you've just made.

- **Client Profile:** Half of the client profile will be given to the client and the other half is kept by the agent. This will quickly show the client what policy they just purchased.
- **Refusal of Coverage:** This is for clients to confirm their refusal of coverage. This can lead to sitting with the client, which is the goal because it can lead to a possible sale.
- **Emergency Response Network:** Collect referrals while sitting with your current client using the Emergency Response Network. The "ERN" is how to present the client and the contact you have been given.

Virtual Sales: Here is the link to the virtual platform: https://www.fflvirtualsales.com This site will explain everything about selling over Zoom or your phone. Please use "success" for the password.

Insurance Tool Kits are found at: http://insurancetoolkits.com Agents will input the clients' conditions and this site will confirm the carrier for whom the client should proceed.

Client Visual Aids: These are documents that can be laminated or placed in a binder for clients to review while you explain policies with them. This can aid in closing a sale.

- Final Expense Benefits - Whole Life: Shows what whole life policies we can provide for clients.
- Credibility: This credibility sheet shows the logos of the many carriers we use and is also part of the Financial Inventory document. This can help clients visualize our credibility with the carriers we represent.

In-Home Agent Documents: These documents are a necessity in each home. This is not a comprehensive list so be attentive to the Bootcamp suggestions and download any documents that you may need.

- Financial Inventory: This will help each agent determine what products will best fit their client. In addition, this can be beneficial for a potential annuity policy.
- Client Worksheet: Another version of the Financial Inventory document.
- FEX In-Home Presentation: This can be given to the client for review of final expense and it will help agents explain these options to their clients.

Dialing Documents: Listed below are the dial day necessities.

- Phone Scripts: Click the link to see the phone script details.
- Call & Appointment Tracker: This will help agents manage dials and appointments.

Extras:

- How to Book More Appointments: **To see your expected results, it is strongly recommended that each agent book 20-35 appointments each week. Do not toss your leads over a rejection. Complete door knocks between each appointment for whom you didn't speak with on the phone or anyone who gave a verbal rejection.**
- FFL-GO.com: Bookmark this site and/or create a shortcut on your desktop. This site has most carrier quoting tools.

Helpful YouTube channels:

- Family First Life
- Family First Life USA
- TNL
- Inside the Sale
- True TalkAdvanced Market Sales