



Top 7 Reasons Why Successful Financial Advisors Include Planning and Life Insurance

1 PRIORITY ONE

Enduring and deep relationships are built by providing goal-based and life insurance planning to your clients. The clients' experience is enhanced as they will appreciate the conversation and gain valuable clarity.

If you aren't guiding these conversations, your clients may have them with someone else.

2 YOU PROVIDE ADDITIONAL VALUE

You can become an integrated and trusted advisor with expanded capabilities, but do not need to be an insurance expert. Your TIME Regional Specialist can be a valuable resource.

3 OUR PROCESS IS ONE OF CONSULTATION

This process is consultative, focusing on your clients' needs - it is not a product forward discussion.

4 REVIEW IS IMPORTANT

Most people do not review their insurance policies on a regular basis. Changes in mortality costs and the impact of low interest rates may result in many policies under-performing original expectations.

5 YOUR CLIENTS WILL APPRECIATE IT

The process of discussing and reviewing their life insurance needs will help to provide clarity to your clients. Some clients will need to make changes to their existing policies. This is designed to be a positive experience for your clients.

6 IT CAN HELP YOUR BOTTOM LINE

Integrating goal based and life insurance planning into your practice can generate revenue for you. This helps you execute on your growth plan.

7 IT CAN HELP YOUR GROWTH

Growing your practice is important in making your future bigger than your past. Advisors regularly share with me how significant the impact was once they added goal-based and life insurance planning to their practice.

To discuss adding goal based and life insurance planning into your practice, call 866.896.4995 to schedule an appointment with your TIME Regional Specialist today.



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