

From the Underwriters Marketing Service Advisory Board



There are a number of steps to completing a successful annual review. These are some of the things that I use in my practice in order to complete an annual review. Then what do I do, after I meet with my client? I call UMS. Why do I use UMS? Why are they important? I use UMS because the good people that work there truly want to help you grow your business and will find answers that many other organizations will not. Here are my top tips for doing an annual review:

1. Use a Basic Common Sense Approach. Meet face to face with 20% of your clients. You can call the other 80%.
2. When you meet them, face to face, you're looking for ways to help them. Look at their current 1040 tax form. That will tell you how much dividends and interest they are claiming. These are simple tasks, but are often ignored.
3. Tell stories about other clients you have helped recently, with similar needs. If income is needed show some of UMS' good MYGAs. These rates change weekly, so be sure to check them out. The current rate is about 2.55%
4. If they are looking for growth, you can't beat Allianz Fixed Index Annuities. Talk about versatility.
5. If they're looking for growth and income, split the money for the best 10 year term period. Either way, your client is better off over that term period.
6. Telling stories that parallel your client's needs is a very powerful tool.

I hope this marketing information helps, it has helped me for many years.

Regards,
Bill Maximo