



Building Your Business

Build a formula and make it your own.



Steps to success

Success comes easier when you leverage your existing potential. Focusing on what you already have can grow your fixed annuity business faster.

Follow these steps to create success for yourself and your clients:

1. Use your existing success

- Recognize your traits, characteristics and habits that already help you deliver results
- Keep doing what works and build on it

2. Raise your credibility

- Know your annuity products, including the pros and cons of each type of annuity
- Understand the market and why consumers are buying annuities
- Be ready to answer clients' questions

3. Focus on being your best

- Become an expert on the annuities you offer — features, benefits and differences
- Educate your clients on which product may be best for them
- Work with carriers that offer consumer-friendly products and exceptional support

4. Set your goals

- Set ambitious goals and plan how you can achieve them
- Aim for higher sales success

5. Be a team player

- Collaborate with others for referral success
- Always put your clients' needs first
- Create a team environment where everyone benefits

By following these five steps, you'll position yourself for success!

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