

Client Focus Connections
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Annuity Script

Hi, my name is _____. I'm calling on behalf of agent _____
with _____ Insurance.

Just a quick call this evening to let you know that _____ would like to
meet with you in regards to the current stock market conditions and offer
you a free asset allocation review along with letting you know about our
fixed rate annuity that has a great rate.

When is the best time for _____ to reach you to set up a time to
discuss your review?

YES – Record time and get a daytime number.

NO - Are there any other insurance needs that _____ can help you
with at this time?

Thank you for your time and have a great evening.