Life
Checkup Assistant™

Your Guide to the Life Checkup Assistant

Because changes in life mean changes in your clients' insurance needs, our Life Checkup Assistant helps you to get organized and start prospecting to your existing client base quickly and easily. Read through this guide for further insight on how to efficiently add "Life Checkups" as a regular part of your insurance business and following up with clients.

Davis Life Brokerage
Your financial services partner... for life

Prospecting is the lifeblood of your business. Stop prospecting, and your business eventually dwindles.

But, have you ever noticed how the most successful agents in our industry can eventually stop most of their prospecting efforts for new clients? Is it because their client base is unusually wealthy?

No, it's because these agents have simply learned one of the best aspects of this business: the most effective use of your time and money is to prospect to your existing client base.

Any business study will show that it is 10 times more expensive to get a new client than to retain an existing client. With an existing client base, you are in a tremendously powerful position to make repeat sales and gain referrals.

Make Sure Your Client Records are Organized & Complete

Organized. How do you currently manage your client records? Is the information randomly placed and maintained in a variety of formats? You will want to spend the time and effort (and possibly even hire the help) to collect all your client information you have saved over the years and compile it into one source that is easy to access and manage.

Complete. As you organize your information you may find that some of your files are incomplete or in need of serious updating. This is a great time to do the research to make sure you have current contact information in order to utilize the rest of the Life Checkup Assistant. This time, effort, and money will be well worth its weight in new sales opportunities. Be sure to get email addresses to make communication with these clients easier.

Use Software for Efficiency

There's no time like the present to get organized and invest in a Client Relationship Management (CRM) system that will put the critical contact information you need at your finger tips.

There are innumerable options on the market today, ranging in price and user-friendly features that will allow you to keep track of important relationship building information. Getting reminders for birthdays, anniversary dates and keeping track of the names of all those new grandchildren could very well give you an edge. Plus, you may be able to keep more effective notes on how appointments went, get notices on important contract dates, merge addresses for mailings and possibly even build email campaigns.

Consider one of these three CRMs. We feel they are some of the most effective on the market for insurance professionals today.

www.bigcontacts.com
www.agencyworks.com
www.salesforce.com

Make Contact with Previous Clients & Collect Email Addresses

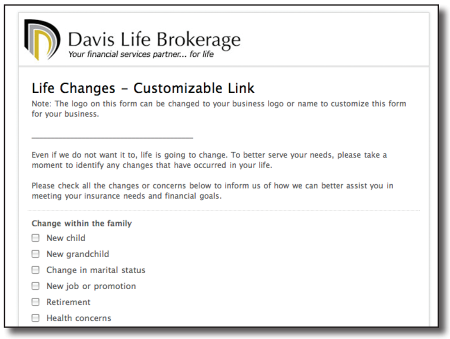
Now that you have your client information efficiently organized (or as you do so), reconnect with clients over the phone to reestablish your relationship with them and their family. Make this a kind gesture with genuine interest in their life. Let them know you'd like to send them a "Life Checkup" via email that they can fill out in their own time to make sure they are meeting their financial goals for retirement and are maintaining a level of insurance protection that will protect their family well into the future.

If they prefer to not give you their email address, offer to find a time you could stop by to do the Life Checkup. Or, you could give them the option of doing the Life Checkup right then, over the phone.

Ask your client if there was anything on the list that changed since they recently filled it out or may have forgotten about. If they were once hesitant about providing information, they may be more comfortable now.

Conduct an Initial Life Checkup

Utilize this customized link offered exclusively by Davis Life Brokerage to send out to previous clients via email. Davis Life Brokerage will forward you the response from your client shortly. The checked boxes will give you insight to the changes in the lives of your clients. This will assist you in preparing for your next appointment with them. Contact Davis Life Brokerage at 800-747-5612 to get this web page customized for your agency.



Davis Life Brokerage
Your financial services partner... for life

Life Changes – Customizable Link

Note: The logo on this form can be changed to your business logo or name to customize this form for your business.

Even if we do not want it to, life is going to change. To better serve your needs, please take a moment to identify any changes that have occurred in your life.

Please check all the changes or concerns below to inform us of how we can better assist you in meeting your insurance needs and financial goals.

Change within the family

- ☐ New child
- ☐ New grandchild
- ☐ Change in marital status
- ☐ New job or promotion
- ☐ Retirement
- ☐ Health concerns

Set an Appointment to Discuss the Life Checkup

Now that you've gotten an informative overview into your client's life, set an appointment to discuss details of their life changes. This is their chance to make sure they are adequately covered and still meeting their financial goals for retirement – and your chance for new sales.

Do you have their mailing address but no email? The Life Checkup Assistant provides you with an attractive, customizable mailer that allows you to request an email address from your clients.

Follow Up & Continue to Deepen Your Relationship

If there were any loose ends from your last appointment, don't forget to follow up! Stay committed from this point on to stay connected to this client. Utilize your CRM and other methods to be reminded of milestones, birthdays, and anniversaries.

Our Life Checkup Assistant provides you with six attractive, customizable mailers that you can send to clients. This keeps you, and the need for your services, in front of them.

Email Request

New Baby Congrats

New Grandbaby Congrats

New Home

New Job

Retirement Congrats

For agent use only. Not to be used for consumer solicitation purposes.

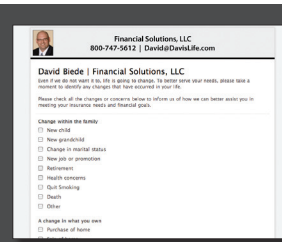
How to Customize Mailers

Contact Davis Life Brokerage at 800-747-5612 to get print-ready mailer files. These files can be sent to any type of printer who can insert your logo and contact information. For larger mailings, the printer may handle the postage addressing needs. If you'd like full service or assistance with this, please contact Davis Life Brokerage – we make it that simple!

Use the Life Checkup Assistant Regularly to Mitigate Responsibility

Choose a regular interval of time (monthly, quarterly, semi-annually, etc.) to send out the Life Checkup Assistant Link to your clients via email. Let them know that you plan to do this. This will give them a regular chance to update any information with you. This is important for three reasons. (1) This keeps your name and service in front of clients who see this in their inbox. (2) If they respond, you have another chance to deepen your relationship and close more sales. (3) Possibly the most important

Periodic newsletters and other messages can refresh your clients' familiarity with you and perhaps spark their interest in a sales concept. Add a link to your customized Life Checkup Assistant to an eNewsletter.


Financial Solutions, LLC
800-747-5612 | David@DavisLife.com

David Biede | Financial Solutions, LLC

Even if we do not want it to, life is going to change. To better serve your needs, please take a moment to identify any changes that have occurred in your life.

Please check all the changes or concerns below to inform us of how we can better assist you in meeting your insurance needs and financial goals.

Change within the family
- ☐ New child
- ☐ New grandchild
- ☐ Change in marital status
- ☐ New job or promotion
- ☐ Retirement
- ☐ Health concerns
- ☐ Quit Smoking
- ☐ Death
- ☐ Other

A change in what you own
- ☐ Purchase of home

reason for this action is to mitigate any legal responsibility from your practice with very little additional time and money from your business. Even if clients delete the email from you, they will have been given a regular opportunity to update their information on a regular basis including change of beneficiaries, divorce, or remarriage.

The bottom line is this: there is tremendous value in your client database and mining it regularly for new sales. The rest is easy: meet with your clients and sell! The rate of return using this system will be well worth it, as you achieve much better results than prospecting for brand new clients.

Life Checkup Assistant™

Davis Life Brokerage
Your financial services partner... for life

Life
Checkup Assistant™

Davis Life Brokerage
Your financial services partner... for life

Customization Request Form

Please complete all the information below. Put a check mark next to the information you'd like included in the banner of your online form. Once submitted, please provide five to eight business days for the link to be completed.

Please save and send this form with photo and/or logo attached to dlb@DavisLife.com.

To review the standard Life Checkup Assistant Click Here.

Financial Solutions, LLC
800-747-5612 | David@DavisLife.com

David Biede | Financial Solutions, LLC

Even if we do not want it to, life is going to change. To better serve your needs, please take a moment to identify any changes that have occurred in your life.

Please check all the changes or concerns below to inform us of how we can better assist you in meeting your insurance needs and financial goals.

Change within the family

- ☐ New child
- ☐ New grandchild
- ☐ Change in marital status
- ☐ New job or promotion
- ☐ Retirement
- ☐ Health concerns
- ☐ Quit Smoking
- ☐ Death
- ☐ Other

A change in what you own

- ☐ Purchase of home
- ☐ Sale of home
- ☐ New investment
- ☐ Acquired assets
- ☐ Sold assets
- ☐ Major investment gain

☐ Agent Name: ______________________________

☐ Business Name: ______________________________

☐ Address: ______________________________

☐ Phone: ______________________________

☐ Email Address: ______________________________

☐ Please use my photo

Photos must be submitted with this form as a .jpg or .gif with minimum resolution of 2" x 2" at 100 dpi.

☐ I will need assistance sending email blasts to my contacts. Please contact me.

☐ Please use my business logo

Logos must be submitted with this form as a .jpg or .gif with minimum resolution of 2" x 2" at 100 dpi.

☐ Other information. Please explain.

____

____

☐ Are there certain fields you'd prefer to modify on the Checkup Assistant's Customizable Online Form? Please explain.

____

____

For agent use only. Not to be used for consumer solicitation purposes.

Need help or have questions? Davis Life Brokerage is ready and available to provide insight and assistance every step of the way. Call us at 800-747-5612 today!