

Jump Start Workshop



Topics

General Session:

1. How to use our website
2. Life insurance comparison: Pros and Cons for each products
3. How Index products work
4. Living benefit product introduction: What is 5 in 1, 3 in 1 and 2 in 1
5. Life product summary: What products are hot
6. Many ways of selling life insurance
7. How to close life insurance sales, 4 Step Closing and what we need to pay attention to
8. How to use life insurance as a supplemental retirement plan
9. What we need to know about underwriting: The differences between each carrier and how to properly fill out applications
10. Proposals training
11. Annuity training
12. Annuity product summary
13. How to categorize clients into different groups and what products we should present to each group

Special topics:

1. Estate planning introduction
2. How can we sell life insurance to Foreign Nationals
3. What is Premium Finance, how we can use it to sell large life insurance cases. How we can take advantage of multiple currency lending (especially Japanese Yen based) so we lower your client's payment by 50%-70%
4. Pension and retirement plan. What plans we can use pre-tax dollars to purchase life insurance
5. Income tax concept: What income tax knowledge insurance agents need to know
6. VUL and VA updates
7. Globalink Securities Product Overview

Date: Thursday, 11/04/2010

1:00 PM – 7:00 PM

Friday, 11/05/2010

9:30 AM – 7:00 PM

Saturday, 11/06/2010

9:30 AM – 7:00 PM

Package:

Three days of workshop

Location:

Transpacific Main Office
1045 W. Huntington Drive
Suite 200
Arcadia, CA 91007

**Seats are limited; please
RSVP as soon as possible.**

**RSVP to Julia Chan or
Fennie Lee:**

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