Asset Care®

Sales idea — Good questions, better results

Experience has shown that sales success often depends on asking the right questions. We have identified some of the most effective questions to ask advisors to generate leads and close more sales!

Required Minimum Distributions (RMDs)
Do you have clients who don't need to live on their RMDs at retirement?

Nonqualified annuity
Do you have clients with nonqualified annuities you're unable to move due to a high guaranteed interest rate?

Surrender charges
Do you have clients with nonqualified annuities you're unable to move due to surrender charges still in place?

Guaranteed Minimum Income Benefit riders (GMIB)
Do you have clients who own old variable annuities with a GMIB they likely won't need for retirement income?

Sufficient income
Do you have clients with sufficient income that could be moved to help protect your assets under management?

When an advisor answers YES to any of these questions, please contact your back office or our Sales Desk at **1-844-833-5520**.

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