

Preparation

Before you start prospecting, the following tools could be helpful to you to educate yourself on the concept and understand what other tools are available throughout the sales process:

- Key Person Client Portrait ([Pub8950](#))
- Key Person Producer Guide ([Pub8960](#))
- GVV Brainshark on Illustrating Key Person (GVU501)
- Key Person Sample [GPS Output](#)

PROSPECTING

The following tools will help you find and approach existing clients and others who would be good Key-Person prospects:

- Key Person SmartTip ([Pub9126](#))
- MarketEdge 360 Prospecting Letter - Email Version ([Pub8954](#))
- MarketEdge 360 Prospecting Letter – Printed Letter Version ([Pub8953](#))

Approach

The following pieces provide tips, best practices, and scripts for client approach on Key Person and other business concepts:

- Business Prospecting/Sales Guide ([Pub8961](#))
- FR Spotlight with Onofrio Cirianni ([Pub10468](#))

Client meeting

Prior to the meeting, contact the BRC for a consultation:

- Meet the Team ([Pub8906](#))
- Obtain support, suggestions, and direction on the case
- Illustration support is available

The following pieces are client approved and available for use during the client meeting:

- Key Person Client Flyer ([Pub8956](#))
- Key Person Client Guide ([Pub8955](#))

Implementation

You will need the following completed items to submit the case to underwriting:

- Application
- Consent to Insure Form ([EOLINOTICE101J 08/09](#))
- Signed GPS Illustration

Your client will need to file the following form with the IRS:

- [IRS Form 8925](#)

Delivery

When the policy is issued, include the following piece with the contract so the client will be reminded why they purchased Key Person coverage and have your contact information:

- Key Person Affirmation Sheet ([Pub8957](#))

Follow-up

- Add a reminder in SmartOffice one year from delivery to contact and ensure policy is still meeting their needs

