

Guardian U

The LBS Sales Process



Step	Outcomes
1. Philosophy	<ul style="list-style-type: none"> • Articulate client goals/concerns • Understand that you are trustworthy AND competent • Commit to exploring further
2. Data	<ul style="list-style-type: none"> • Collect critical data points using Getting Started • Complete Quick Facts • Provide necessary documents
3. Protection Analysis	<ul style="list-style-type: none"> • Connect Wealth-Building Potential to desired future wants/goals • Agree that protecting future Wealth-Building Potential is important • Understand the Cash Flow Sources available to solve problems • Commit to the amount of protection
4. Cash Flow Analysis	<ul style="list-style-type: none"> • Commit to the amount to save • Agree on overall investment allocation • Agree that costs of Whole Life are captured over time • See Whole Life as a flexible, multi-use asset
5. Implement & Review	<ul style="list-style-type: none"> • Full protection implemented • Saving 15-20% • Head start on liquidity • Debt elimination underway/completed • Contributing to Whole Life • Contributing to investments • 5-Star LBS User • 5-10 referrals • Efficiency!