

## AGENDA

1. Why Was The Form Filled Out?
  - a. Final Expense/Burial Costs
  - b. Income Replacement/Mortgage Protection
  - c. Leverage Legacy
  
2. What does it look like for the family if there is no insurance in place?
  
3. Who am I
  - Field Underwriter- I'm going to help you figure out what you're medically eligible for
  - Broker- I work WITH all of the insurance companies, I don't work FOR any of them.
  - Non-Captive- I am able to shop around for you with multiple companies
  
4. Here's what we're going to do today
  - 2-3 minutes of health and finance questions
  - Based on how you answer those questions, I will make a recommendation
  - Then, we will show you some options.
  - Once we find an option that makes sense, we will submit a request for coverage to find out what you can qualify for.
    - If you do not qualify: We will find a different plan and resubmit for coverage
    - If you do qualify: We will have 30 days to adjust up, adjust down, or leave it alone
  
5. 3 Things To Accomplish Today
  - Make sure you can afford it
  - Make sure you can qualify
  - Make sure you understand it
  
6. Financial/Health Inventory
  - Go through the questions
  - Who is going to be picking up the pieces?
  - Any life insurance currently in place?
  
7. Show You The Options/Get A Second Opinion From Senior Underwriter
  
8. See If You Qualify