

Using Life Insurance for Retirement Planning



MIDLAND NATIONAL
Life Insurance Company

Pick Three Worksheet

Use this worksheet to pick three clients that might benefit from this sales idea.

Life insurance not only provides death benefit protection, it can also help with financial needs during retirement. A permanent life insurance policy can be structured as a self-completing tax-advantaged plan, providing the opportunity to help supplement your client's retirement income.

If your clients...

- Have a need for death benefit protection
- Are between the ages of 30 to 55
- Have a middle to high income
- Are self-employed, corporate-employed, or in a partnership
- Are concerned about their family's financial needs if death occurs during working years
- Are looking to enhance retirement income in their retirement years

...then they may be a good fit for this sales idea.

Please list the names of three clients who fit the above descriptions and whom you would like to help meet their life insurance needs and retirement income goals.

First Name, Last Initial	Age	Approximate Annual Funding Amount
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Agent Name

Date

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