5 Steps of Appointment Preparation

The Most important piece of getting business issue/paid - is **Proper Product Placement**. In other words - write applications that you know will be issued with a 90-95% certainty. How do you do that? - We have everything in place for you to do that.

1. Use the Client Qualification Form

Use this form when setting appointments and get the answers to the medical questions to the best of your ability on the phone.

2. Virtual Mentor

This is a spectacular tool to narrow down the carriers that you will be considering

3. Check the applications/Agent Guides

Pull out the applications and look at the questions - does the client still fit? Are there multiple impairments? In that case check the agent guide to double check medications; impairments; build

4. Call the Carrier/Risk Assessment

If anything falls into a gray area or you are still unsure for any reason - Call the Carrier and do a Risk Assessment. Remember to write down to whom you spoke

5. Verify with your Mentor

Email your findings and the products you will be presenting to the client to your Mentor - He or She will give you the thumbs up or suggest other options based on experience. Do NOT skip this step for your first several weeks in the field.