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Tell me ABOUT YOUR MONEY

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the most important phrase that I have learned in my career

Without a doubt, this is the most important phrase that I have learned in my career with Penn Global. If you think that you are just an “insurance agent”, you are wrong. Our clients trust us with so much, and their money should be part of that.

At the end of every sales appointment, I want you to use this phrase. “**Tell me about your money.”** Don’t overthink it, don’t worry about how they will respond. Just say it. It’s about starting the conversation.

How many of your current clients know that we sell annuities? How about universal life products? I bet they know you as a “Medicare Specialist” because that’s what you have talked to them about. By bringing up the topic of their money, you are opening the door to that side of our business, not to mention dramatically increasing your income potential.

Now, just because you use that phrase doesn’t mean they will immediately tell you what you want to know. Often, they will respond with something like, “What do you mean?” or “Why do you want to know about that?” Keep in mind that you are at the end of the sales call. They have gotten to know you over the last 1-2 hours and are comfortable with how you do business. Likely, you have already solved a problem for them during this meeting, so lean on that trust.

Here is an easy response to their question:
“Now that we have your Medicare coverage figured out, we need to make sure to protect your money. When you retired, did you have a 401 (k) through your company?”
Going in this direction solidifies how much you have already helped them and then makes them answer a specific question. Whether they have a 401 (k) or not, you are now able to ask more questions like “Is your money invested in the market?” or “Have you ever seen your investments go down?”

Keep in mind that we are completely fine with asking someone about their health history, list of prescriptions, height and weight, age, and even social security number. We don’t think twice about bringing those topics up because we need to know those answers to help them. ***Asking about their money should be no different.***

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