



# BUSINESS MODELS

## 3-STEP CLOSE



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**Penn Global** has a system to be used after every presentation

## The 3 Step Close: After every presentation, Sale or No-Sale

At the end of every presentation, there is a moment when an agent must decide: I am happy with my sale, and let's get to the next one, **or** I didn't get the sale, this is a dead end.

The most successful sales reps understand that every opportunity does not present itself in the present. What you decide to do at this moment will undoubtedly affect future opportunities.

**First**, transition immediately to **Legacy Safeguard (LS)**, exclusive to **Integrity**. All materials are at: <https://legacysafeguarduniversity.com/post-registration/>. Follow the Consumer Presentation, a flip chart. Next, enroll the prospect or client and educate them on their next steps. Refer to the Legacy Planning Archive, show them the document, and walk them through the information they should provide their family: passwords to phone and social media (let's not lose those pics), life insurance info, agent contact info, and financial docs (retirement, pension, portfolio). Now go back to the flip chart and do the last 2 slides. Allow the client to sponsor 6 people for a Free Legacy Safeguard: Beneficiary, Emergency Contact, and four additional loved ones. Referrals. Go to your Integrity Agent Portal client center and add these names to a TAG you will create for LS referrals. Fill out the LS Gift Certificates and work your referrals.



**Second**, deal out 8 Penn Global (compliance-approved) business cards. Educate the client on how to use them (Podcast #2 in the Penn Global website under marketing). Now you have your **prospects and clients** marketing for you. Sale or non-Sale, people appreciate our knowledge when we did a great presentation and maybe they can't qualify or did not see the reason for a need at this time. That doesn't mean they won't call in the future or be in contact with a friend who has the need. They will share your card and market for you.



**Finally**, close everything up, pause, apologize that you have one more question, and say: "Tell me about your money". There are only 3 things a client says: Why do you need to know that? What do you need to know? Or they will start talking. Learn to write annuities and help your client



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"Please note that the information provided here serves as general guidelines and should not be considered as fixed timelines for progress. Each individual's journey is unique, and personal circumstances, abilities, and experiences can significantly influence the pace of development. We encourage you to use this as a flexible framework and adapt it to your new agent's specific needs."



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