



FINAL EXPENSE

GOPLAN

FINAL EXPENSE

SIX STEPS TO SIX FIGURES

www.lastingmark.com



01

GET STARTED



Get Licensed:

Pre-licensing Course - 24 Hours of Course Time

- [XCEL Pre-Licensing Discount Link](#)
- Licensing - 7-10 Days
- What you should be doing:
 - Anti-money laundering
 - LIMRA - [LIMRA LINK](#)
 - Purchase E&O Insurance - NAPA - [NAPA Link](#)

Get Contracted:

- Please see onboarding instructions for uploading any certifications or insurance documents. [Contracting Made Simple](#)
- What you should be doing:
 - Promptly answer all contracting requests to prevent delays
 - Complete pre-onboarding checklist
- What you should be doing:
 - Promptly answer all contracting requests to prevent delays
 - Complete pre-onboarding checklist



02

GET TRAINED

**What you should be doing:**

- Connect with your upline for training
- Confirm **LINK** login credentials and access the **LASTING MARK Training Center Here**
- Subscribe to the *Life Insurance Academy* Youtube & Podcast
 - For Video subscribe on **Youtube**
 - For Audio subscribe on **Apple Podcast** or **Spotify**
- Be on the *Monday Launch Call* and any scheduled team calls
- Subscribe to **Insurance Toolkits Here** for underwriting support

Face To Face Final Expense Telesales

- Purchase the LIA Final Expense Presentation - Visit The Store
- Download the **LIA Phone Scripts Here**

Final Expense Telesales

- **Available here** in The Training Center
- Start To Finish Telesales Course - Coming Soon

What Trainings should I focus on?**LASTING MARK Training Center**

- **Back to Basics Coaching Replay here**
- **Final Expense Presentation Mastery here**
- **Final Expense Start-to-Finish here**

Life Insurance Academy Content

1. "How to Invest \$1500 to Make \$245,000 in Your First Year of Life Insurance Sales" (with Roger Short) **Youtube**
2. "Straight Talk about Telesales as an Insurance Agent" **Youtube**
3. "Cracking the Code to Consistent Life Insurance Sales" **Youtube, Apple Podcast, Spotify Podcast**
4. "You Really CAN Make \$100,000 in Your First Year of Life Insurance Sales" **Youtube, Apple Podcast, Spotify Podcast** (Start at 5:42)
5. "How to Make \$1,000 a Day Selling Life Insurance" (with Zach McElwain) **Youtube**



03

GET LEADS

**Timeframe:**

- 1-2 weeks after contracting

What you should be doing:

- Communicate with your upline to determine next steps
- Determine budget and lead type
- Access Lasting Mark [Lead Store Here](#)

DIRECT MAIL LEADS:

- 25 leads/week
- Average cost \$40-\$50/lead
- Average closing ratio 30%.
- Cost= \$1,250 AP= \$5,400

DIGITAL LEADS:

- 100 Leads/week
- Average cost \$16/lead
- Average closing ratio 15%
- Cost= \$1600 AP= \$9,000

Final Expense



04

GET SELLING



FINAL EXPENSE

- **What you should be doing:**

- Connect with your upline daily
- Role-play with your upline and team
- Face-to-Face-30 Door knocks a day/5-6 presentations a day
- Virtual/TeleSales-300-400 dials per day/6-7 presentations a day

- **Cross-selling Opportunities:**

- **Beginner-** Annuities through the Lasting Mark Retirement Elevate Program
- **Advanced:** Medicare and Medicare Advantage

05

GET PROFITABLE

- **Timeframe:** Advanced commissions are typically paid 36-72 hours after policies are approved and issue paid
- **What you should be doing:**
 - **Invest**
 - Think like a business owner and invest for production & revenue
 - Invest in a recurring weekly lead order
 - **Communicate**
 - Communicating daily with your upline
 - **Work**
 - Implement a system and consistently work the system
 - Retire every lead



FINAL EXPENSE



■ Evaluate

● Manage and track your numbers

- Phone calls
- Door knocks
- Appointments set
- Connections
- Presentations
- Sales
- Referrals

■ Promote Yourself

- Review the [LM Life Advancement Guidelines Here](#)
- Target and achieve your next quarterly production benchmark
- Receive your promotion and compensation increase

DIRECT MAIL LEADS:

- 25 leads/week for 50 weeks
- Average cost \$40-\$50/lead
- Average closing ratio 30%.
- Cost= \$1,250 AP= \$5,400

Total end of the year revenue based off of a 95% compensation rate = \$164,200*
Net revenue after marketing investment = **\$101,700**

DIGITAL LEADS:

- 100 Leads/week for 50 weeks
- Average cost \$16/lead
- Average closing ratio 15%
- Cost=\$1600 AP= \$9,000

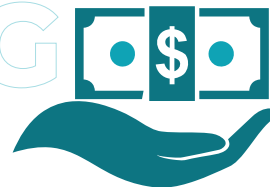
Total end of the year revenue based off of a 95% compensation rate = \$273,600*
Net revenue after marketing investment = **\$193,600**

*Placement & Persistency: 80% placement rate & 20% chargeback rate factored in



06

GET BUILDING



- **Timeframe:** As soon as possible
- **What you should be doing:**
 - Communicate with your upline daily
 - Set growth and business development goals
 - Invite people to come and see the opportunity
 - Invite them to attend trainings from your upline and LM training events
 - Invite them to shadow you as you sell - Virtual and F2F
 - Identify leaders and duplicate your efforts through them
 - Help your leaders build their teams





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