FINAL EXPENSE

GO PLAN

FINAL EXPENSE

SIX STEPS TO SIX FIGURES

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01 GET STARTED

FINAL EXPENSE

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

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  - Promptly answer all contracting requests to prevent delays
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02 GET TRAINED

FINAL EXPENSE

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

- **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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