



Your 30 Second Script: Rethinking Retirement

The market and indeed the world has changed over generations. People are still trying to retire using methods and approaches that leave them short of their goal. Qualified plans provide a brief refuge from taxes now, in exchange for income in their golden years, but is that enough? What about timing and choosing the correct assets? What do they do when the market goes down again? What if you want it sooner, or what if you want to wait? Too often, the rules work against people who have faithfully followed them. It can easily overwhelm a client.

Ask your clients these simple questions and watch their reaction:

- What if you had a retirement asset that grew without the typical market risk of qualified plans?
- What if that asset grew tax free?
- What if you only had to fund it for 5 to 10 years?
- What if when you took the money, it was tax free?
- What if you were able to choose when and how you took the money, not the IRS?

Most likely, the first question they ask will be either “Can we really do that?” or “Can you tell me more?” Often, they ask both.

Then, come speak with us

Rethinking retirement and how America can successfully protect itself is one of our specialties. We’ll give you the script to help you help your clients toward a better retirement. We’ll give you the track to run on and all of the sales support and case management you need. We’ll change your practice.

Be brave enough to ask us how.

Deven Hennessey
Director of Marketing
Head of Premium Finance
Elite Marketing Group
Direct 713.507.1040
Cell 802.881.8788
Fax 713.507.1090
dhennessey@elitemktg.net
www.elitemktg.net