Annuity Lead Generation Sample

Introduction (For All Scenarios)

Hi, this is [Your Name] from [Company Name]. How are you today?

[Pause for response.]

I'm reaching out because we have some **great options for annuity plans** that could help you grow your retirement savings while protecting your principal from market volatility. I'd love to see if we can find the best annuity plan for your financial goals.

Before we proceed, I just need to ask a few quick questions to ensure we find the right plan for you.

Qualification Questions (For All Scenarios)

1. **Full Name**:
   Could you please confirm your full name?
2. **Age**:
   May I ask your age to ensure you qualify for the annuity plans available?
3. **Retirement Status**:
   - Are you currently retired, or are you planning to retire soon?
     - If YES, proceed.
     - If NO, continue to the next question.
4. **Investment Goals**:
   What are your primary goals with an annuity plan?
   - Are you looking for **income**, **principal protection**, or **growth potential**?
5. **Current Retirement Savings**:
   Do you currently have retirement savings or funds you are looking to roll over into an annuity?
   - If YES: Roughly how much are you considering investing?
   - If NO: Proceed to the next question.

6. **Timeline**:
   Are you looking to make an investment decision soon, or are you exploring your options for the future?

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1. Callback Lead Handling (Annuity Plans):

Step 1: Confirm Interest

- Would you be interested in scheduling a callback to go over the annuity options in more detail?

Step 2: Schedule a Callback

- When would be a convenient time for our licensed agent to call you back and discuss your retirement goals?
  - **Morning**
  - **Afternoon**
  - **Evening**

Step 3: Verify Details

- Let me confirm your details to ensure the callback is scheduled properly:
  - **Full Name**:
  - **Age**:
  - **Investment Goals**:
  - **Retirement Savings** (if applicable):
  - **Timeline**:

Step 4: Close the Conversation

- Great! You'll receive a call from our agent [Agent Name] at [Scheduled Time]. Please expect the call, and thank you for your time!

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2. In-Person Appointment Handling (Annuity Plans):

Step 1: Offer an In-Person Appointment

- If you'd prefer, we can schedule an in-person meeting with one of our licensed agents to go over the annuity options and help you choose the best plan for your retirement. Would you be open to meeting with us?

Step 2: Schedule the Appointment

- What day and time would work best for an in-person appointment?
  - **Option 1**: [Date/Time]
  - **Option 2**: [Date/Time]

Step 3: Verify Details

- Let's confirm your details to ensure everything is set for the appointment:
  - **Full Name**:
  - **Age**:
  - **Investment Goals**:
  - **Retirement Savings** (if applicable):
  - **Timeline**:

Step 4: Confirm the Appointment

- You're all set for an appointment with [Agent Name] on [Date/Time] at [Location]. Please let us know if anything changes.

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3. Live Transfer Handling (Annuity Plans):

Step 1: Live Transfer Introduction

- I can transfer you to one of our licensed agents right now, who can walk you through the annuity options available and help you find the best plan for your retirement. Do you have a few minutes to speak with them?

Step 2: Verify Details

- Before I transfer you, let's quickly confirm your information:
  - **Full Name**:
  - **Age**:
  - **Investment Goals**:
  - **Retirement Savings** (if applicable):
  - **Timeline**:

Step 3: Initiate the Transfer

- Great! I'll transfer you now to [Agent Name], who will review your options and answer any questions you may have.

Step 4: Close the Transfer

- Thank you for your time, [Prospect Name]. You'll be speaking with [Agent Name] shortly.

Common Rebuttals (For All Scenarios)

- **Not Interested**:

  "I understand. However, annuities can be a great way to secure your retirement with guaranteed income and principal protection. Would you be open to exploring options at a later time?"

- **Already Have an Annuity**:

  "That's great! Many of our clients already had annuities but found that new options provided better benefits or returns. Would you like to compare your current plan with what we can offer?"

- **Can't Invest Right Now**:

  "I understand. Annuities can be tailored to fit different investment timelines. Would you be open to discussing options that can benefit you down the line?"

- **How Did You Get My Information?**:

  "We usually receive information through online requests or from retirement databases that help people like you find suitable annuity plans."

Final Confirmation (For All Scenarios)

Before ending the conversation, confirm the following details:

1. Full Name
2. Age
3. Investment Goals
4. Retirement Savings (if applicable)
5. Timeline
6. Next Steps (Callback, In-Person Appointment, or Live Transfer)

Closing Statement:

Thank you again for your time, [Prospect Name]. We're committed to helping you find the best annuity plan for your retirement needs. If you have any further questions, feel free to contact us at [Phone Number]. Have a wonderful day!