

Introducing IncomePLUS...

Help your clients create reliable retirement income AND preserve their financial assets

Great Plains Annuity and Life Marketing is pleased to introduce our new tool to help you better serve clients concerned about creating a retirement paycheck without exhausting their savings.

IncomePLUS is defined as “Income” and the acronym PLUS, which stands for Preferred Laddering Utilization Strategy. GPALM can now help contracted producers create a customized presentation to show clients and prospects possible strategies to create their ongoing retirement paycheck, while protecting and growing their nest egg at the same time.

IncomePLUS can be a valuable asset in distancing you from your competition. Imagine approaching your clients and prospects with the chance to review what their dreams, desires and goals for retirement are, then showing them how to position various financial products and ladder their assets to accomplish those dreams and goals.

Instead of simply adding another annuity or life policy to their portfolio (IF you closed the sale), you have helped them clarify and define what they want to accomplish, and the opportunity to review their total financial picture. During this review, you have a great opening to educate your prospect on the basic benefits of principal-protected insurance products and how those products might help them accomplish their goals with less risk. You may also find underperforming life policies, CDs, and other financial products that can better serve the client if repositioned.

IncomePLUS is designed to be versatile to meet your client’s differing needs. Every client has different needs, goals and desires that need to be met to make sure that their plan is “perfect” for them. IncomePLUS is an exceptional tool that



allows you to work WITH your client to show them a picture of how they might reach the following goals:

- Reliable, tax-advantaged retirement income they can never outlive
- Security for their spouse after they are gone
- Tax-advantaged wealth transfer solutions for heirs and children
- Ability to pay life and long-term care premiums in a tax-advantaged manner
- Laddering concepts that allow flexibility to reposition assets in the future, depending on the financial and tax consequences
- Ability to clarify what their risk tolerance is, and position their financial resources accordingly to maximize growth, minimize risk, and sleep better at night

Want to learn more?

Call your GPALM Marketing Advisor or Brad Allen at 800-710-1115 for details on the illustration and the rest of our GPALM IncomePLUS Marketing System! We can give you assistance for a personalized a direct mail prospecting campaign, client approach pieces, fact-finder and more.