

1. VBS Sheet...

(5 MINS) BUILD RAPPORT WITH CLIENT / RECRUIT (GET THEM TO LIKE YOU AND TRUST YOU AND BUILD COMMON GROUND)

- “I want to first off thank you very much for your time. I promise that the time you spend with me tonight will be well spent.” OK?
- “Where do you work?”
- “How long have you worked there?”
- “Do you enjoy what you do?”
- “What a beautiful home you have.”
- “Do you see doing what your doing now for the rest of your life?”
- Remember that people you are talking to are a hundred times more interested in themselves and their wants and problems than they are in you and your wants and problems.
- Be a good listener. Encourage others to talk about themselves.

Just make a Friend.

2. (3 MINS) VALUES BASED SELLING SHEET (VBS)

- “Before I talk about me and my company, I would like to get to know what’s important to you first.”
 - ***“What would you say, (____) is the most important thing in your life is to you?”***
 - ***When they say Family...***
 - “Aside from your Family, What other goals and dreams do you have for the future?”
 - “If money was not an issue what goals and dreams would you consider?”
 - “If you had financial freedom how would you spend your time?”
 - “If you could name your monthly income, what would it be?”
- *****Ask in the values based selling...

What’s most important to you, the life insurance / debt / investments?

When they say Protection, make sure you write the life sale that night. (IF NOT INSURED)
If they say investments, you get a commitment for them to attend the very next client Overview so we can take care of their investment needs. If they say life insurance, keep it simple and get the life application first. Remember to educate the client and give the client what they want.

V.B.S.
Trust Respect Customized

Name: _____ & _____ Careers: _____ & _____

What do you **like** about your career? What do you **dislike** and **what would you change** if you could?

What is the **most** important thing in your life to **you**?

What are some of your goals & dreams that **cost money**? H.E.A.L.T.H.R

1. HOME _____ 2. EDUCATION _____ 3. AUTO _____
4. LEGACY _____ 5. TRAVEL _____ 6. HOBBIES _____

Are they paying you enough money to achieve all the goals you have for your family?
Yes or No

How much money would you need to earn annually to live the life you just described?
\$ _____

When will your current job / profession pay you the income you need to realize your dreams?

If your job/profession won't allow you to realize your dream life, what's more important to you...
staying in your job or profession or living your ideal life? **Job or Living Ideal Life.**

If I could show you a **legitimate** and **viable** way to realize your dream income would you take
advantage of it? **Yes or No**

- This is **WHY** I decided to go to work with PRIMERICA. (3 min.)
- I want you to ask yourself **three questions** while I make my presentation.
 1. Is Primerica credible?
 2. Are the financial solutions we create for people life changing?
 3. Who do you care about that would benefit from meeting with us?

Write down **anyone you would like to introduce us** to on this form. (Hand out referral form)

- Looking at these financial areas, which **2** are most important to you at this time?
Debt Free / Retirement / Protecting Family / Increasing Your Income
- Now let me show you who we are, what we do and how that might benefit you or someone you care about.