



AEGIS FINANCIAL

LEADING THE WAY

Billion-dollar phrases and questions from Americas top producers

Fact Finding Questions:

- How much of your retirement can you afford to lose?
- What is the purpose of your ____? (E.g. IRA, NQ, 401k)
- What would you like it to accomplish?
- How much of your income do you want based on guarantees and how much on probability?
- Where are you currently keeping your money safe?
- Are you happy with the rate of returns on your ____? (E.g. money market, CD, bonds)
- How long have you had that sitting in CD's, or in a Money Market?
- Do you have any immediate plans for that money?
- Why do you have that money just sitting there earning such a low rate?



Conversation piece and mindset shift:

- You've moved from the ROI (Return on Investment) stage of your life to the ROI (Reliability of Income) stage.
- People buy off of emotion and justify it by logic. Create that emotion.
- How do you become a pro?
 - You need to standardize what you do.
 - Do it the same way every time.
 - Pro's are consistent.

Closing Phrases:

- Have you ever been sorry for doing the right thing? Do you believe this is the right thing?
- Well that's what I would do if I were you! Let me know and I'll get the paperwork ready.

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