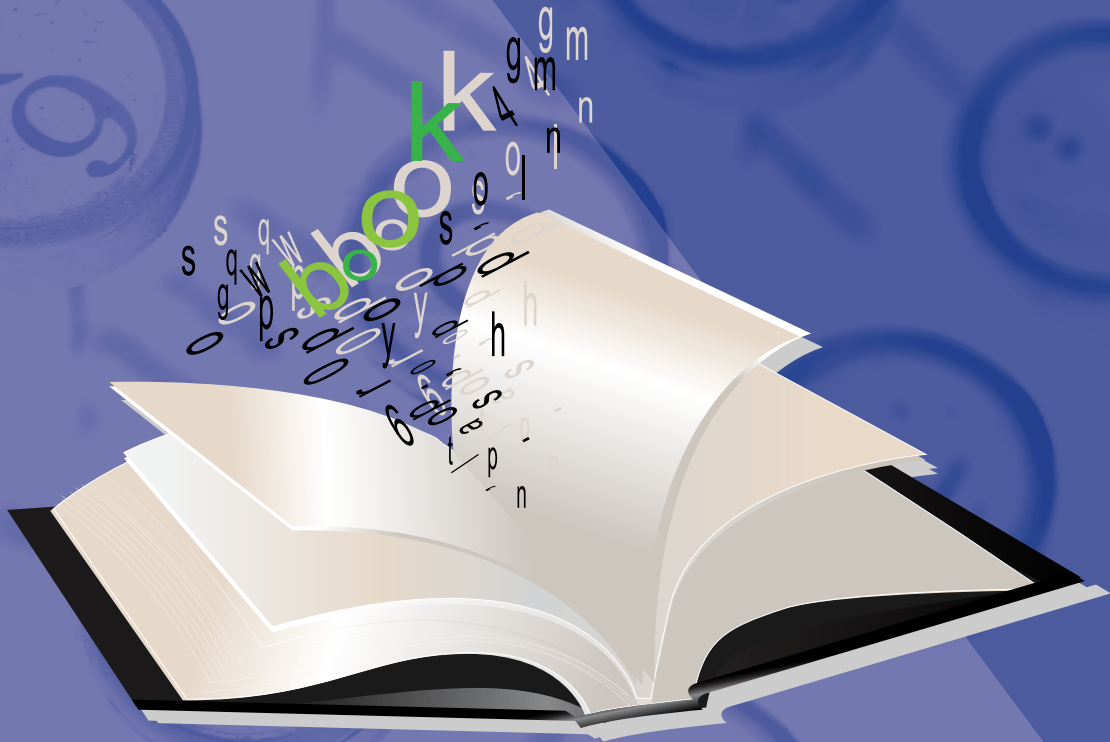


Story Time

with ELITE producers

Storytime can produce BIGTIME sales!



Painting a picture for your clients and prospects through stories and analogies.



AEGIS FINANCIAL
LEADING THE WAY

“Story selling” is an attempt by marketers and salespeople alike to combine the art of story-telling with the process of selling.

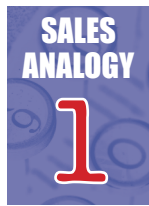
As the ‘ol saying goes, “Everyone wants to buy, but no one wants to be sold.” If that’s true, how, then, do the top sales men and women in the financial and insurance industry convince people to buy from them without actually “selling”?

The answer: stories and analogies!

Using compelling stories and analogies in your sales process can be very effective in communicating with clients and prospects. After all, “Story telling is about connecting to other people and helping them to see what you see,” says Michael Margolis.

We put together a collection of five sales analogies, concepts, and stories from just a few of our top annuity producers (with a combined annual indexed annuity production of over \$60MM!) who use these stories in their sales approach with prospects every day.

Incorporate one, or all of them, into your sales process!



Insurance for Your Retirement

This is a fairly simple, yet highly effective way to communicate the need for retirees to have protection against loss for their retirement. In other words, the need for a fixed indexed annuity in their portfolio for downside protection.

The concept is easy for people to understand and perhaps that's what makes it so effective (other than the fact that it holds true).

We as Americans, have been conditioned to seek protection against loss/partial loss for all of our largest assets by way of insurance. We insure all of our stuff, the most notable being our homes. We also insure our vacation homes, our cars, boats, jewelry, etc. We even insure our lives!

Why, then, do many people with 401(k)s, IRAs and other retirement accounts in the market not have insurance on them? This is a powerful question to ask your clients and prospects!

In many cases, people's retirement accounts are their largest asset, yet they choose not to insure it? Why? Well, they probably didn't know there was such a thing as 'retirement insurance.' Now they do, and you get to be the one to tell them!

Once upon a time...

It's Scientific!

A compelling story with an emotional trigger alters our brain chemistry, making us more trusting, understanding of others, and open to ideas.

There is also research to support the theory that consumers are more swayed by non-factual factors to make purchase decisions.

As human beings, it's how we think. It's how we process and remember information.

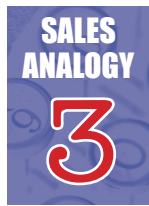
The Surgeon

This is a great analogy when dealing with prospects who simply want free information and who do not commit to an appointment. To set the stage, this is the point in the conversation where you have qualified and uncovered a problem that needs to be fixed.

This will sound all too familiar, but at that point in the conversation, the client, who admittedly has problems with their retirement says, “Just send me the info.” One of our top producers uses an approach similar to that of a doctor in that a ‘self-treatment from a how-to book’ isn’t going to fix their problem, and they need the help of a professional.

Your response will go as follows: “Mr. Client, if you had a lump on your neck and needed emergency surgery, would you say, “Just send me the info”? No! You would say, “When can I see the surgeon?” Mr. Client, just as a surgeon is an expert in their field, this is what I do. I’m an expert in retirement planning, and I can fix your problem.

Once upon a time...



The Truck Driver

This one comes in handy when your prospect has an existing relationship with a stockbroker or another fee-based planner. Use it how you see fit. If you need to, make it yours by changing the occupation, locations...whatever, but make it your own.

Last week I met with a truck driver. I drove way out to _____ (city) in the middle of nowhere to this run-down truck stop. The guy, super nice but kind of contentious, LOVES the market. So, I ask him, “Mr. Jones you’re a truck driver right?”

“Yea I’m a truck driver” he says.

“You do the route between Montana and New York?” (again, make it your own). “Yea,” he responds.

“Wow, that’s a long way. I bet you get paid pretty good money?” “Yea, I make about \$7,000 a trip.”

“Wow, \$7,000 a trip? That’s good money! Let me ask you a question. When you make that drive, if you lost half of your load along the way, would you still get paid when you get to New York?”

“Well no I wouldn’t get paid, I wouldn’t even get half the money. I’d probably get none of my money.”

“So, Mr. Jones, your broker just lost half of your load, why is he still getting paid?”

Once upon a time...

An effective sales story changes everything!

If you want to get your prospect to lower their defenses and invite you in for a dialogue...

If you’d like them to perceive you as a professional problem-solver, value-creator, and maybe even an expert or consultant...

Then stop leading with what you and your company do, and start your story with the issues already on their mind!

The Tortoise, The Hare & Smokey

You all know the old story of the tortoise and the hare. It's my favorite Aesop fable.

The best part for me is when the hare thinks he is so far ahead that he decides he can take a nap. This reminds me of the stock market — when it took a huge “nap” on all retirees in 2007-2008.

So, who is the tortoise? That would be the banks and the CDs that are currently getting 1%. So, what do you choose? Can you put all your money in the “tortoise” and know that when the hare takes a nap you will ultimately just keep going...?

What if there was a third racer? One that had more speed than the tortoise but kept you awake to avoid the naps. This is the new character in my fable called “Smokey.” Smokey is in between the two, and in our financial lives, he's called an indexed annuity. It will give you the ups of the market (better than the tortoise) and avoid the losses in downturns (unlike the napping hare).

So, if you really want to win at the “retirement fable,” let's look at an indexed annuity.

Once upon a time...



INcome planning vs. IFcome planning

You might be wondering what kind of financial professional I am....

I am a financial professional that specializes in INcome planning. The problem is, you have more than likely been meeting with financial professionals that specialize in IFcome planning.

My financial strategies are called INcome planning because you can count on it coming in. The no-market-risk strategies I use are based on contractual guarantees, backed up by the assets of very large, highly rated companies. Therefore, you can count on the money coming IN to your retirement.

Most advisors and financial planners specialize in IFcome planning. I call it IFcome because you don't know IF it is going to be there when you need it. IFcome is retirement money that is invested in stocks, bonds, mutual funds, or any other variable account.

IFcome is the type of money that can be gone overnight just because of some war, economic downturn, or because some crooked CEO or bank caused your retirement to collapse.

Let me ask you, do you want INcome planning that you can count on and never outlive? Or do you want IFcome planning, the type of planning that can cause 50% of your retirement money to disappear without notice and for reasons that you have no control over? The type of planning that has high fees and some financial advisor telling you, "Don't worry, it's only a paper loss"?

Mr. Client, you cannot afford IFcome planning. Let me show you how you can personally take the "IF" out of your retirement today

“The human species thinks in metaphors and learns through stories.”

– Mary Catherine Bateson

TOP 4 KEYS TO A GOOD STORY

A great story seller begins with a hook that entices curiosity. Open with a statement that will make the user want to hear more.

Keep your story minimalist in its form. The more long-winded your story is, the more chances your listeners' attention will wander.

Contrast a clear “before” and “after” situation in your story to show the user the benefits that your product brings with it.

Make sure you have a happy ending. Biology supports happy endings in stories by releasing the neurochemical dopamine into our limbic systems that leaves us feeling good about ourselves and the brand associated with the story.