



# PYLE FINANCIAL GROUP

## Annuity Process

- Consistency & Commitment / Mindset & Passion
- Discovery Call – 15 mins / Introduction / Review FI / Plant Seeds / Find Hot buttons / Request Statements
- Intro to Appointment – Review & Restate Discovery Call / Review Client Statements
- Introduce Annuity Concept – 3 Handouts – Life Cycle / SATARF / 3 Financial Options
- Annuity Genuis – Carrier recommendation
- Carrier selected brochures
- Present Illustration
- Complete E-Application
- Request Funds