Insurance Pro Shop

TRAIN. MARKET. SELL. GROW.

FIELD GUIDE · 2026 EDITION

How to Attract & Sell the *Ideal* Insurance Prospects

For your current products and services. The simple, proven strategies that can double or even triple your leads, appointments and sales in the next 90 days.

by Jeremy Nason

Insurance Pro Shop · Helping average agents become elite advisors

A MESSAGE BEFORE WE BEGIN

The Harsh Truth: You've Been Sold the Wrong Plan for Success

Before we dive into how to attract and sell your ideal insurance prospects, and reveal the simple, proven strategies that can double or even triple your leads, appointments and sales in the next 90 days, we need to level with you. This might be uncomfortable to hear, but it's something far too many agents and advisors never confront.

> *"You've been sold the wrong plan for success."*

Most agents believe there's some quick fix: a magical lead source, a shiny new sales script, or a hot product that will suddenly have prospects lining up, begging to meet with them and buy. They think if they just get the best rates, the newest idea, or the right IMO, everything will finally click. But that's a fantasy.

The real reason so many agents struggle, and why as many as 95% leave the business in their first five years, is that they've been taught to **chase sales instead of attracting the right prospects**... and to **pitch instead of solving problems**. The few who survive four years earn an average net income (after expenses) of only $45,000 per year.

> *"According to the American Council for Life Insurance, the number of life insurance agents has shrunk by nearly 100,000 in recent years. For every 1,000 agents recruited, only 14% survive the first four years. Surviving agents produce an average of just $45,000 of earnings in their fourth contract year."*
>
> **American Council of Life Insurance**

Almost every recruiter, agency head and lead company will tell you they have a great turnkey lead and sales system, and that if you follow it, you'll make a 'bazillion dollars.' But the facts say otherwise. Only '1 out of 6' agents survive past four years, and only '1 out of 10' of those survivors earn $100,000 or more. Do the math: out of 1,000 agents hired this year, only about 140 will survive to year four earning roughly $45,000, and only 14 will earn $100,000 or more.

No matter what you're told or want to believe, the odds of surviving and earning a significant six-figure income in insurance sales are only about **1.4 out of 100**. But you can get off to a quick start, dramatically increase your odds of survival, and earn a consistent six- or seven-figure income with the right knowledge, training, coaching, and mentoring.

It starts by learning how to become the most respected, trusted financial advisor in your local community (the person people want to see) so you can consistently attract the 'ideal insurance prospects' to you. That's about delivering a consistent message of how you make a positive difference in people's lives, instead of just making a sale.

Unfortunately, you can't just rely on what a recruiting organization tells you. As the president of one of the largest IMOs in the country told Lew Nason after asking to review one of our marketing and sales systems:

> *"I glanced at the information you sent me, and it would not fit our focus because of the amount of time it takes to get the training done. Excellent material! Our training process is to get as many people as we can on the boat to find out who can write — before we spend any time or money training them."*
>
> **President of a major IMO** · direct quote

Lew heard very similar responses from many large IMOs and career agencies. They believe it's cheaper to play the numbers game than to train agents. Lew was told the same thing by upper management when he was a branch manager for a major insurance company. So the questions you should be asking are:

- What does it take to succeed today in insurance sales?
- What training do I need?
- Where do I get the training?

> ***It's up to you. You can keep believing the hype, or take complete control of your career, starting today.***

PROVEN 80% SUCCESS RATE (DOCUMENTED)

Lew Nason and his son Jeremy trained agents and advisors for over four decades on how to properly apply these powerful insurance and annuity sales concepts to help people. As a manager for Met Life from 1989–94, Lew hired 23 brand-new agents. Over ten years later, 18 of them were still in the business: an **80% success rate**, versus the industry's 95% failure rate.

PROVEN SIX-FIGURE ANNUAL INCOMES (DOCUMENTED)

All 18 of those agents were earning more than $100,000 per year. Today many make $200,000, $300,000, and much more. According to LIMRA, the average net income per agent is less than $50,000 per year, yet the people we've trained have net incomes well above $150,000. That's more than triple the industry average, and puts them in the top 1% of all agents today.

Please listen: over the years you're going to spend thousands of dollars in time, money and effort building your business. Why not learn the marketing, prospecting and sales strategies the most successful agents and advisors on the planet use?

YOUR GUIDE

Jeremy Nason

Co-creator of Insurance Pro Shop™ and Found Money Management™

Every great performer knows that talent alone isn't enough. Whether you're competing on the lanes, on the court, or in the marketplace, the difference between good and great almost always comes down to three things: the right tools, the right training, and the right coaching.



Lew and Jeremy Nason

Jeremy Nason learned this early, not in a classroom, but in a bowling pro shop. As a serious competitive bowler, Jeremy spent countless hours there: getting fitted for the right equipment, working with coaches, and learning that the smallest adjustments, made with the right guidance, could produce dramatic results. The pro shop was where serious players went to get seriously better.

His father, Lew, knew the feeling well. As a competitive tennis player, Lew was a fixture at the tennis pro shop: same mindset, different sport. Both men understood from firsthand experience that even the most dedicated, hardworking player hits a ceiling without the right tools and support around them.

So when Jeremy and his dad looked at the insurance industry (full of hardworking agents who were struggling not from lack of effort, but lack of the right guidance) the answer was obvious. These agents needed a pro shop. And together, they built one.

Insurance Pro Shop™ was founded on that premise: financial professionals deserve the same quality of tools, training, and coaching that serious athletes rely on to reach the top of their game. Jeremy's career in the industry began in 1994 at just 17 years old, and over 25+ years as a Regional General Agent, Recruiter, Author, Speaker, Trainer, Consultant, Coach, and Mentor, he has helped agents generate over $200 million in life & annuity premium, with thousands doubling and tripling their incomes along the way. He also created Found Money Management™, a proven system that helps agents guide middle-income families out of debt and into lasting financial security.

But the number Jeremy cares about most isn't revenue. It's transformation. The agent who went from struggling to thriving. The family that finally has a real plan. The advisor who rediscovered why they got into this business in the first place.

This guide is the pro shop in print, built by a father and son who believed this industry deserved better, and written for the agent who is ready to step up their game.

Welcome to the pro shop. Let's get to work.

THE FOUNDATION

Master the Greatest Business Skill You Can Ever Learn

The right message, to the right prospects, at the right time

Would you like to know the greatest business skill you could ever learn? Pay close attention, because it's this:

> *"Knowing how to find and attract your ideal prospects."*

Most agents don't really understand this skill. They want to believe that closing sales for life insurance, annuities and services is nothing more than a numbers game: that the more people they talk to, the more they'll sell. Technically there's some truth to that, but it's not close to the whole story.

Most agents use a **shotgun** approach, targeting anyone who breathes, instead of being a **sniper** targeting their ideal prospects. So they spend a lot of money on leads, fax blasts, direct mail, phone dialers, free reports, newspaper ads and dinner seminars, all built around promoting the latest products, returns, or a hot new idea. These outdated approaches do little to build credibility, respect and trust, and they don't consistently put you in front of ideal prospects who have the money, the need, and want your help. You end up wasting most of your time and money chasing poor-quality prospects to close a few sales.

It's up to you. You can keep believing the hype, playing the numbers game and pushing products, struggling year after year. Or, in the next 90 days, you can learn what the top 1% of producers are doing today to earn a net income of $150,000, $300,000, or much more every year.

UNDERSTANDING AND MASTERING THIS SKILL

Attracting the ideal insurance prospects is composed of three distinct skills:

> *"The right message, to the right prospects, at the right time."*

In simple terms, this is about becoming a specialist in solving a specific, immediate problem for people... deciding who the ideal prospects are for your specialty... then constantly delivering your special message to those prospects. It's about becoming the trusted advisor people want to see.

> *"Your success in sales is not about how good you are at convincing people to buy. Your ultimate success rests on whether your prospects believe you are working in their best interests. Can they trust you?"*
>
> **Lew Nason**

1. DETERMINE YOUR SPECIALTY (THE RIGHT MESSAGE)

Is selling about getting people to buy what you want to sell, or about helping people buy what they need to solve a problem they have? This is where most agents stumble from the start: they have the wrong idea of what selling is, so when a lead comes in, they struggle to turn it into an appointment, let alone a sale.

- Do you have an urgent problem you can solve for your prospect? If they don't have a problem, why should they meet with you? If it isn't urgent, why should they meet with you right now?
- Does your prospect recognize the problem? What can you say to help them see it and agree to an appointment?
- Does the prospect want to solve the problem, right now? What can you say and do to move the sale along?
- Even if they want to solve it, do they have the money? What can you do to help them find it?

2. DECIDE WHO THE IDEAL PROSPECTS ARE (THE RIGHT PROSPECTS)

Most agents want to believe everybody is a good prospect, so they waste time and money on the wrong people.

- Are some people better prospects than others? If you sell life insurance, is it easier to sell to a single person, or to someone with a family to protect?
- Are there areas, companies or associations with groups of your ideal prospects? If you sell one person in a group, is it easier to reach the others?
- Are there prospects you relate to better, people you have more in common with? When you relate better, isn't it easier to set an appointment and close a sale?

3. CONSTANTLY DELIVER YOUR SPECIAL MESSAGE (THE RIGHT TIME)

Most agents spend all their time trying to meet and sell strangers: the hardest, most frustrating and most expensive way to build a business. Yet that's what most lead systems focus on.

- How hard is it to set an appointment with someone who's never heard of you? How much credibility and trust do you have with a stranger? Don't most people prefer to do business with people they already know?
- How much easier would it be if a prospect's trusted advisor or friend recommended and endorsed you?
- How much easier is it to book people who have already heard of you and your work?

To build your reputation and attract the ideal qualified prospects, you need to consistently use several of the lead systems in this guide, in a way that constantly delivers your special message at the right time.

> *"People buy when they are ready to buy, not when you are ready to sell."*

MARKETING

Stop Struggling With Your Marketing

It's not that the methods don't work. It's that no one taught you the insider secrets.

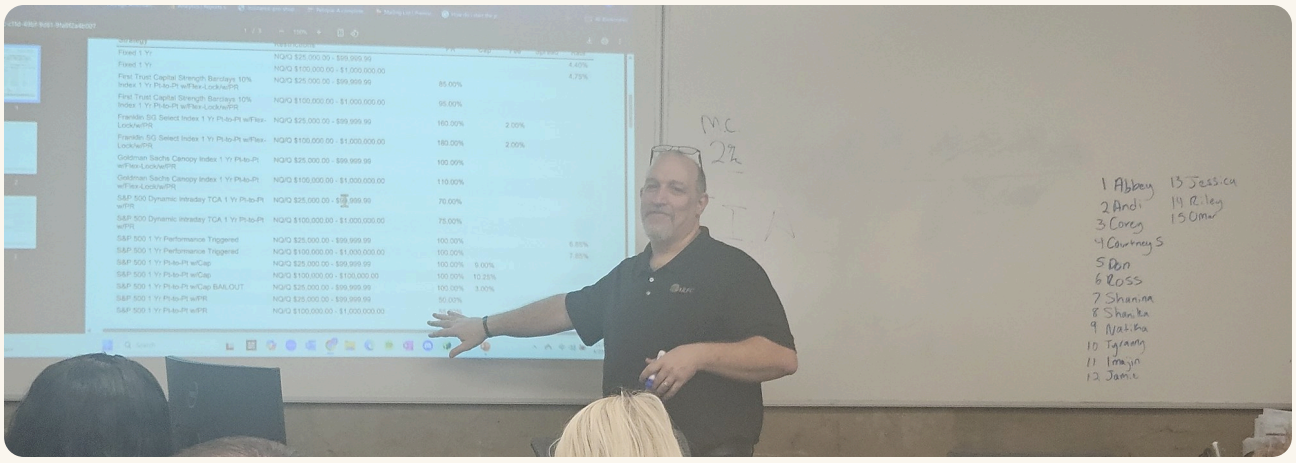
Most advisors we talk to have tried purchasing leads, information booklets and free reports, client newsletters, direct mail, postcards, joint-venture marketing, dinner seminars, educational workshops, referrals, newspaper articles, press releases, being a guest on local TV or radio, lead groups, and more, without much success. The reason isn't that these methods don't work. It's that they were never taught the little insider secrets and tricks of the trade to make them work.

They didn't follow through. They tried one method at a time. They were looking for one quick way to generate a steady flow of leads, instead of learning how to combine these proven methods into a complete marketing program that consistently delivers your message at the right time, putting you in front of more ideal prospects in one month than most agents see in an entire year.

Imagine having an avalanche of highly qualified prospects phoning, mailing or emailing you each week, practically begging to meet with you. Wouldn't that be a great problem to have?

You can take the trial-and-error approach and build your own marketing system, or you can have more ideal prospects than you can handle within days, by learning from the people who've already done it and paid for the trial and error. We've identified specific, immediate problems you can use to attract ideal prospects in a virtually untapped market, and detailed the most effective, quickest lead-generation methods, with the tools, philosophies and insider secrets behind them.

No more cold calling, buying expensive leads, or taking a commission cut to get leads. You'll learn how to be in front of more ideal prospects in one month than most agents see in a year, for under $200 per month.



A live IPS class, working real cases

The Very Best Ways to Generate Leads and New Sales

What follows is a list of the best and worst lead-generation methods used today, in order of importance, and the primary reasons they aren't working for most agents, plus what you must do to get them to work for you.

01 Annual Reviews

If you ask million-dollar producers where most of their new sales come from each year, they'll tell you it's annual reviews with existing clients. According to LIMRA, the average person buys life insurance seven times over their life, and that's not counting Long-Term Care, Disability, annuities and investments. Having coached hundreds of agents, Jeremy Nason is still surprised how many skip annual reviews. Most are so busy chasing new clients they neglect existing ones, then wonder why they get no calls or referrals. **Insider secret:** If clients refuse your offer of a review, is it because they see you as just another salesperson, and not as a trusted advisor?

02 Beneficiary & Claims Follow-Through

When you deliver a claim check, that family suddenly needs guidance on a lump sum, income replacement and their own coverage, and you've just proven, in the hardest possible moment, that insurance works. It's the highest-trust conversation in this business. **Insider secret:** Handle a death benefit with genuine care and follow-through, and you don't just keep the client. You earn the whole household, and the referrals that come with it.

03 Referred-Lead Programs

Those same producers get most of their new prospects from referrals, yet most agents are frustrated with them or don't use them. Why? Because they haven't made themselves referable. People won't refer family and friends to just another salesperson. **Insider secret:** To earn a referral, provide ongoing service, follow through on your promises, and build a relationship of credibility and trust. You must become the trusted advisor people want to see. **Note:** The goal of every advisor should be to put prospecting on automatic as fast as possible, so you spend 90% of your time in front of prospects. One of the best ways is making yourself referable and building a referred-lead system that constantly generates high-quality prospects.

04 Centers of Influence

Build a small circle of professionals who already serve your ideal market (CPAs, estate and elder-law attorneys, realtors and mortgage pros) and trade trusted referrals. Their endorsement carries their credibility, so the prospect arrives already trusting you. **Insider secret:** Bring THEM a referral first. Reciprocity is the fastest way onto a busy CPA's short list: give before you ask, and keep giving. **Note:** This is the professional cousin of a joint venture; the difference is a one-to-one relationship built on you sending business their way.

05 Client Appreciation & 'Bring-a-Guest' Events

Unlike a prospecting workshop, a client-appreciation event exists to thank the people who already trust you (a dinner, a shredding day, a family movie night) and to invite them to bring a friend. **Insider secret:** The introduction you earn over dinner is worth ten cold leads. Structure the event so clients naturally introduce you to their guests, then follow up with those guests the next week.

06 Monthly Newsletters

It surprises Jeremy how few agents stay in regular contact with their clients, family, friends and prospects. 'Out of sight, out of mind' is a deadly mistake in sales. Every day your friends, neighbors and even some clients buy the same products you sell, but not from you. Why do they go to your competition? Often because they never hear from you. **Insider secret:** A monthly newsletter reminds them what you do in a non-threatening way; there's no pressure to buy. **Insider secret:** Remember, the average person buys life insurance seven times, plus DI, LTC, annuities, IRAs and other investments. When they're ready to buy again, do you want them buying from the first agent who calls, or from you?

07 Educational Workshops

One of the most overlooked and best ways to find prospects, introduce your services and set appointments is an inexpensive educational workshop. No one wants to meet one-on-one with a salesperson, but there's safety in numbers. A workshop is a non-threatening way for people to get to know you and the help you provide. They cost little (generally under $200) and, as a public service, can be held almost anywhere: the local library, association rooms, conference rooms. Most agents just don't know how to get the right people to attend. **Note:** Getting the right prospects there means personally inviting people you already know: friends, family, clients, referrals, joint-venture partners, and people who requested your free booklet. The same format works as a worksite or association 'lunch-and-learn': one free educational talk can put you in front of dozens of pre-qualified people at once.

08 Webinars & Virtual Workshops

The online cousin of the educational workshop above, with near-zero cost and far wider reach: people who would never drive to a library will happily join from their kitchen table. **Insider secret:** Record it once and it becomes an evergreen asset: a lead magnet you hand to prospects on demand and share with joint-venture partners to send to their lists. Fill it the same way you fill a live workshop, by personally inviting the people who already know you.

09 Information Booklets & Free Reports

A big mistake agents make is trying to sell themselves directly in every communication, generating lots of prospects that lead to little business, and dealing with the merely curious. In the information age, giving away a free report or booklet makes your target market come to you: the try-before-you-buy approach. Done right, the people who come forward are pre-screened, qualified prospects. Offer your free report in everything you do, even on your business card. The problem is agents expect everyone who steps forward to buy right now, but people buy when they're ready, not when you're ready to sell. **Insider secret:** Keep in front of these prospects with a newsletter so that when they're ready, you're the one they contact, and invite them to your workshops.

10 Joint Ventures & Strategic Partnerships

Joint-venture marketing is the ultimate insider secret for generating thousands of new prospects in your area, rapidly and with the utmost credibility. Share your clients and prospects with other successful businesspeople in return for them sharing theirs. The most successful businesses keep lists of their best customers and send them helpful information, because people prefer to do business with people they trust. If you've tried it and it didn't work, it's because most agents go about it wrong. **Insider secret:** Most set up a passive referral system where the business refers people only if someone asks. To make it work, set up an active contact system that gets people to call you for help, or come to your free workshop.

11 Lead Groups

Another great source of high-quality leads is joining or forming a lead-exchange group with local professionals who already serve your ideal prospects. It's a formal group of businesspeople who meet weekly or biweekly for about an hour to exchange leads. At each meeting, two or three members give a 10-minute talk on what they do and who their ideal prospect is. Only one person per industry is allowed, so there's no competition, and each member must bring leads for others. **Insider secret:** Lead-exchange groups are a great way to get known in your community and set up joint ventures.

12 Dinner Seminars

While somewhat expensive ($4,500–$5,000 with the mailing and dinners), dinner seminars are still very effective: done right, you can be in front of 50 or more high-quality prospects within six weeks. There are two critical mistakes 90% of agents make. **Insider secret:** First, they go cheap on the restaurant or invitation, running a newspaper ad to save money, but the paper reaches everyone, so the wrong people show up. To get the right people, specifically invite them and target a group meeting the right criteria. The bigger reason advisors struggle is they only set appointments with 10–30% of the audience, and half of those cancel or no-show, usually because the advisor isn't getting the audience emotionally involved. **Insider secret:** If prospects don't see how the information relates to their situation and how they'll benefit from meeting you, why would they set an appointment? **Note:** With a little coaching, we've helped agents set appointments with 70–90% of their audience, and those appointments stick.

13 Get Found Online: Website, Google Profile & Reviews

People search the moment they're ready to buy, the very definition of the right time. If you don't show up with a real website, a claimed Google Business Profile and a few genuine reviews, they find a competitor who does. **Insider secret:** A handful of honest five-star reviews and a complete, claimed Google profile out-pull most paid ads for local trust. Ask satisfied clients for a quick review right after a review meeting or a delivered claim, while the gratitude is fresh.

14 Local Radio, Podcast & TV Guest Spots

Talk radio, podcasts and television are powerful tools to get your message to the public and get known: one of the quickest, easiest and least expensive ways to build a local reputation. People think talk shows are well-guarded kingdoms; it's the opposite. Hosts struggle to fill thousands of hours of airtime and want good guests. **Note:** You have great information and a valuable product. Just ask the producer or host to let you be a guest, and don't forget to send a press release.

15 Educational Video & YouTube

Answer the exact questions your ideal prospects are already typing into Google and YouTube: 'Will my Social Security be taxed?' 'Will I outlive my money?' A short, helpful answer-video pre-sells you as the expert before the first call. **Insider secret:** You don't need production polish. You need to be genuinely helpful and easy to find. Post the clips to your site, your newsletter and your social platforms, and point prospects to them.

16 Articles in Local Media & Social Platforms

Get published in every local media source and on Facebook, LinkedIn and X. If you need ideas, rewrite articles from the web. Always include your byline and offer a free report. An article gives you far more credibility than an ad, and it's free advertising. Make reprints to send to clients, friends, family, referrals and prospects.

17 Guest Speaking for Associations & Religious Groups

As a financial expert you have a lot of knowledge on helping people manage their money, and many groups are looking for a qualified authority to share with their members. Let them know you're available, and send a press release.

18 Adult Education Classes

Offer an adult-education class at the local high school or college. Before and after the event, send out a press release.

19 Active Community Involvement

The Lions Club, Rotary, Chamber of Commerce, Jaycees and many other organizations host civic events each year. Be an active leader, and write articles about the event with your byline. Before and after, send a press release.

20 Press Releases

Press releases are one of the most effective ways to drive prospects to your website, page, workshop or seminar, educating prospects and earning major publicity with little cost or effort. A press release is a one-page summary of your work that tells the media why they should write about you or have you as a guest. **Insider secret:** It must contain an interesting angle that makes you relevant to the media's current audience. Make it a news release, not an ad. Provide content of immediate interest or lasting value, and respect your readers' intelligence: don't scream 'buy me' or gush about yourself. Resist the temptation to give your sales pitch, or media people will dismiss you as just another clown among advisors.

21 Use Free Publicity to Get Known in Your Market

Insider secret: How much easier would it be to set an appointment with prospects who already know and respect you and your work? If you want that, seek free local publicity. You must become the trusted advisor people need and want to see right now.

The Worst Ways to Generate Leads and New Sales

Over three decades we've surveyed and worked with some of the biggest producers in the industry, and we've yet to find a successful advisor (consistently earning $20,000+ per month) who relies on any of the following as a major part of their marketing. They can fill gaps and help with slumps, and they're fine when you're starting out, but they won't consistently put you in front of your best prospects.

Newspaper & Magazine Ads. A low-cost way to get some calls or seminar attendees, but you never know if the right people will see it. Usually you waste time and money on the wrong people.

Direct Mail. There are two types. Mailing to people you know (friends, family, clients, joint-venture referrals) can be very effective. Mailing to a cold, targeted list is essentially junk mail. **Insider secret:** To be even somewhat effective with a cold list, you must send at least 5,000 pieces of a great sales letter, and that's expensive. Unless you have a big budget and a great letter, there are far more cost-effective ways to generate the right leads.

Buying Pre-Set Appointments. I've never met an agent who's happy with pre-set appointments. **Insider secret:** They may be useful to fill gaps and slumps, but little more.

Buying Leads. If you've ever bought leads, you know very few are good prospects. Most are old and have already been sent to other agents. The same goes for 'aged' or shared internet leads: recycled to many agents and long past the moment of interest.

Cold Calling. A hit-and-miss proposition with a lot of negativity. Done long-term, it's a major cause of agent burnout.

Auto-Dialers & Mass-Text Blasts. These combine cold calling's low intent with real legal exposure. Blasting calls or texts to people who never asked to hear from you annoys the very community you're trying to build a reputation in, and it can put you on the wrong side of the rules. **Insider secret:** There's no shortcut around trust; volume dialing and blasting erode it faster than it builds.

Worst Offender: Live-Transfer Leads. On the surface they sound like a dream: pre-screened prospects delivered right to your phone. In reality, most agents find them frustrating, expensive and rarely worth the cost. **Insider secret:** Many calls are low-quality or come from people pressured to stay on the line. They often don't remember filling out a form, don't know who you are, and aren't truly interested, and you're paying top dollar for lukewarm conversations. Live transfers may fill your calendar, but more often they drain your wallet and your patience.

A NOTE ON COMPLIANCE

The calling and texting methods above (cold calling, live transfers, auto-dialers and mass texts) carry real TCPA and federal and state Do-Not-Call exposure, and the rules have only tightened. This isn't legal advice; check with qualified counsel before running any outbound calling or texting campaign.

If you want a constant stream of ideal insurance prospects, you need the insider secrets top producers use to make these proven methods almost foolproof. That's what's in our specialized systems, and why the people we work with are consistently in front of more ideal prospects each month than most agents see in a year, earning $20,000 to $50,000 per month within 30–60 days of investing in our systems and training.

> *"The definition of insanity is doing the same things over and over again and expecting a different result."*



Jeremy, Lew, Mehdi Fakharzadeh and IPS alumni at the Trusted Advisor Success Training

A STRAIGHT TALK

Are You Ready to Commit to Substantially Improving Your Sales?

Straight to the point: the next few pages could hold the vital key to a substantial increase in your sales leads and your sales, in only a few days. That's if you're prepared to keep an open mind and be completely honest with yourself. Honest enough to accept that perhaps the prospecting and sales systems you're currently using aren't as good as they should be, or humble enough to admit they're almost totally ineffective.

Rather blunt? Maybe. But what's the point in burying your head in the sand? Just hoping things will improve won't solve your problem.

> *"Your situation won't improve until you decide to take positive action, and you make it happen."*

From 1982 to 1989 Lew Nason was in personal production and qualified for many prestigious awards and sales conferences with Met Life and NAIFA. From 1989 on, he trained and coached agents on how to properly apply these powerful marketing, lead-generation and sales concepts to attract and actually help people. Since Lew and Jeremy Nason started the Insurance Pro Shop in October 1999, they have helped thousands of agents worldwide double and triple their monthly income within a few months of investing in IPS systems, training and support. But that's enough about IPS. Let's talk about you.

SO, YOU THINK YOU'VE DONE IT ALL?

You've contracted with great companies and have top commission schedules. You've got a steady flow of leads and a great sales presentation. You've got the top products in the industry (for this week, anyway). You've worked hard, yet you're still struggling to get people to meet with you and close sales, still only making an average living. Contrary to what your managers and companies tell you, your success is not based on the companies you represent or the products you carry. It doesn't matter how many designations follow your name or how low your premiums are. **People prefer to meet with and buy from people they know, like and trust**, and only a well-planned marketing and sales program will do that for you.

WHY DO SOME AGENTS KEEP BUCKING THE SYSTEM?

Top-quality mailers, newspaper ads and dinner seminars will certainly expose you and your products to the maximum number of prospects. But without the right program to build trust, credibility and a positive image, you're just another insurance agent trying to make a sale. Over three decades Lew watched intelligent, hardworking agents lose a bundle because they stubbornly believed the secret to appointments and sales was a great product and company. They blamed the ad, the mailing list, or the economy, tried again with a new ad, list and product, and ended up broke and out of the business.

IT'S NOT HOW YOU SAY IT, OR WHAT YOU SAY, THAT SELLS

Most agents want to believe a good talker with a great presentation will set lots of appointments and close lots of sales: that you need the 'gift of the gab.' But Lew knew many good talkers who were hopeless salespeople. Have you ever met a salesperson who talked you to death, or confused you with technical jargon? Did you buy from him? Lew never claimed the gift of the gab, and he struggled early on. He almost quit several times. But early in his career he was lucky to meet two men who changed his life, teaching him persistence, goal setting, keeping it simple, self-belief and total honesty. The most important lesson: to succeed in sales, you must take the time to build relationships.

> *"People have got to get to know, like and trust you before they'll do business with you."*

Lew never looked back after those lessons. Later, someone showed him how to do the same things much faster, by learning how to correctly market and sell his services. So how will you benefit from our programs? It's simple, and it comes in two parts.

FIRST: YOU'LL LEARN HOW TO ESTABLISH A TARGET MARKET

We'll help you understand and establish yourself in one of the best target markets for you in today's economy, based on three decades of research and experience. You'll learn to use the perfect combination of powerful, persuasive marketing strategies and tools to enhance your reputation and consistently attract ideal prospects to you, instead of chasing them. Within days you'll be setting appointments with ideal, highly qualified prospects who are ready to buy.

SECOND: YOU'LL LEARN HOW TO REALLY HELP PEOPLE

Closing a high percentage of your sales calls takes more than gathering the facts about someone's finances. You'll learn to ask the right questions to uncover a prospect's attitudes, opinions and unspoken feelings, and to guide prospects to discover and state their own pain, so they help sell themselves. Through a series of practical, nuts-and-bolts lessons we'll strip away the mystique of marketing and sales, so you can build the fundamentals that have qualified prospects calling and buying from you every day. But you must be prepared to put in the effort, because, despite what Walt Disney said, there isn't a magic wand.

> *"Many good financial advisors are not good at selling — they are great at marketing. The opposite is also true: many good salespeople are terrible marketers. If you're a good marketer, selling is much easier. But if you are a good marketer and a good salesperson, you can take your sales career to the very top of the industry."*
>
> **Lew Nason**

WONDERING WHERE TO START?

The Fastest Way to Put This All to Work

Have questions or need help? Call us at 770-443-2852

If you invest in just one insurance marketing and sales training program all year, start with this one. As an IPS member you'll have complete access to all the marketing and sales fundamentals you need, with live virtual sales classes every month, so you can get off to a fast start selling insurance, annuities and investments while guaranteeing your long-term success.

Insurance Marketing & Sales Resource Center™

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