AMG
brokerage general agency

Existing Client Prospecting Tool

Which of Your Clients.....

1

- Are 60-80 Years Old
- Have qualified accounts or deferred annuities valued at $1,000.0000 or more
- No longer need all or part of the asset for income
- Would like to reduce tax liability for heirs

1 ______ 2 ______ 3 ______

2

- Are concerned about transferring their estate to heirs
- Have assets in excess of $2,000,0000
- Are concerned about estate taxes
- Are charitably inclined or have children or grandchildren they care about

1 ______ 2 ______ 3 ______

3

- Own life insurance policies for more than $1,000,000
- Have not reviewed policies in the last 5 years
- Would be interested in reviewing ways to lower premium or increase coverage
- Have a life insurance policy with more than $50,000 of cash value

1 ______ 2 ______ 3 ______

4

- Own a closely held business worth $5,000,000 or more
- Would like their business to continue in the event of their death or disability
- Would like to keep the business in the family
- May be interested in reviewing a supplemental retirement plan

1 ______ 2 ______ 3 ______

5

- Need to build assets for retirement
- Are ages 35-55 and have a 10 year investment horizon
- Have income of $100,000 or more
- Have maximized their 401(K) or profit sharing plan

1 ______ 2 ______ 3 ______

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