



Prospecting Kit

Whole Life Insurance

Get More Out of Life – Accumulation

Leverage cash value for clients planning for college, retirement, or other goals.



How to use this guide

Start conversations about whole life insurance with this complete set of social media posts, emails and phone scripts.

1. Copy and paste the posts, images and emails you want to use
2. Share on your favorite social media platform or via email
3. Follow up with consumer materials and more available on assurity.com/SellMoreLife



Tip: The best time to post on social media is any weekday between 9am and 2pm.

Social Post 1

Life Insurance with Cash Value Growth

Caption

With whole life insurance, grow cash value you can access throughout your life to help pay for children's education, care for aging parents and more. Send me a note and let's talk about how it can work for you.

[Download Image](#)



Social Post 2

Cash for Retirement

Caption

Let your money work for you with whole life insurance. It builds cash value that you can access to help supplement retirement income or use for anything else you want. Send me a message to learn more about how it works.



[Download Image](#)

Social Post 3

Plan for College

Caption

Plan ahead to make your children's college dreams a reality. Whole life insurance includes a built-in savings component called cash value you can use when it's time for college – message me to talk more.

[Download Image](#)



Social Post 4

Growth Plus Guarantees

Caption

Get all the guarantees of whole life insurance plus access to money when you need it. One locked-in cost gets you a guaranteed death benefit, guaranteed cash growth, and options to help you reach your goals – let's talk more.



[Download Image](#)

Email 1

Insurance to Help You Reach Your Goals

Subject:

Reach Your Goals with Whole Life Insurance

Body:

Hi [CLIENT NAME],

You don't have to choose between insurance protection and achieving your big goals. With whole life insurance, you can get the protection of life insurance with a savings component that builds cash value you can use for anything. Use it for extra retirement funds, paying for a child's education, or whatever else you need – and still have money to leave your loved ones.

Let's talk more about your plans and how whole life insurance might fit.

When do you have a few minutes to discuss your goals?

Email 2

Build Cash Value with Life Insurance

Subject:

Get Insurance that Builds Cash

Body:

Hi [CLIENT NAME],

Did you know that whole life insurance includes a built-in savings component? With guaranteed cash value growth, get access to money you can use for anything at any time. Plus, there are options to further enhance your cash value growth. It's a great way to get insurance protection and money for your big goals or handling unexpected expenses.

I'd love to talk more about how you can get more out of your insurance.

When can you talk?

Phone Script 1

Reach Your Goals

Intro:

Hello [Prospect's Name], I'm [Your Name] with [Your Company Name].

Prioritizing your goals doesn't need to be difficult. There's an option that lets you get permanent life insurance protection while building cash value you can use to make your dreams a reality. Whole life insurance helps you make sure your loved ones will be taken care of when you're gone, and can even come with living benefits. Is it a good time to talk about how whole life insurance can fit your needs?

Objection 1: It's too expensive.

That's a common concern with life insurance – it's hard to prioritize when you have so many other expenses to think about. But life insurance is often more affordable than you might think – it could be as low as just a few dollars a day. It's also one of the best ways to make sure your loved ones will have something to rely on. Let's figure out what your price is so you can make the right decision.

Objection 2: I already have life insurance through my job.

It's great that you've already taken steps to protect your loved ones. Do you know what kind of life insurance you have, or the amount of coverage? Your workplace coverage may not stay with you if you change jobs, and the coverage amount is often low. We can supplement your existing coverage with affordable, permanent protection that will always be there for you. How does that sound?

Objection 3: It can wait/I'm healthy.

I'm glad to hear you're in good health now. And that means now is exactly the right time to get coverage. You'll get better rates when you're young and healthy, and they're guaranteed for life, even if your health changes. Let's see what your price is today – it's probably lower than you think.

Phone Script 2

Build Money for the Future

Intro:

Hello [Prospect's Name], I'm [Your Name] with [Your Company Name].

Nobody knows what the future might bring. But you can get options for whatever comes your way – whole life insurance with guaranteed cash value growth. It provides permanent protection at a cost that stays the same. You can use cash value growth for any unexpected expenses or extra retirement income. And it comes with built-in living benefits to give you money if you face a sudden medical crisis. How does that sound to you?

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