

Assurity®

# Prospecting Kit

## Whole Life Insurance

Get More Out of Life – Legacy

Help clients leave a gift to their family or a charity.



# How to use this guide

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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](https://assurity.com/SellMoreLife)



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

# Social Post 1

## Maximize Your Legacy

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### Caption

Whole life insurance can be a great way to maximize your legacy or charitable giving with a guaranteed death benefit from day one. Let's talk about how you can make a bigger impact for the causes you care about.

[Download Image](#)



# Social Post 2

## Leave Something Behind

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### Caption

Make your impact with confidence – whole life insurance can give you security to leave money to your family without worrying about the ‘what-ifs.’ There’s more than that, too – message me and we can talk.

[Download Image](#)



# Social Post 3

## Be There for Your Family

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### Caption

It's not for you — it's for them. Whole life insurance gives you peace of mind, helping make sure your family isn't burdened when you're gone. Send me a message, let's talk more.

[Download Image](#)



# Social Post 4

## Legacy Plus Living Benefits

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### Caption

Leaving a legacy doesn't have to leave you behind. Whole life insurance can come with built-in living benefits, letting you plan for when you're gone and access money when facing major health events. Let's talk about how your insurance can work for you.



[Download Image](#)

# Email 1

## Build Your Legacy with Whole Life

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**Subject:**

Leave a Legacy When You're Gone

**Body:**

Hi [CLIENT NAME],

It's easy to leave a legacy for your loved ones with whole life insurance.

It's permanent lifetime protection with a guaranteed death benefit, and it comes with features you can use while you're still alive.

I'd love to talk more about whether this is the right choice for you – and if it is, applying for coverage is a fast process. When do you have time for a quick call?

# Email 2

## Leave More for What Matters

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**Subject:**

Make a Bigger Impact with Life Insurance

**Body:**

Hi [CLIENT NAME],

If you have big plans for your money after you're gone, you might want to consider whole life insurance. With a guaranteed death benefit from day one, you can make sure you leave something to a cause you care about. And you may even be able to leave more money than you otherwise could.

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?



# Phone Script 1

## Maximizing Legacy for Charity

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### **Intro:**

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

We're all looking to get more from our money – and that goes for the money you leave behind, too. If you want to leave something to the causes or charities you care about, there's a great way to maximize your gift: whole life insurance. It's a powerful tool for securing your legacy, while also giving you options to use while you're alive. Can I show you how it works?

### **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

## Leave a Gift for Loved Ones

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### **Intro:**

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

There's so much to think about in the future – saving for retirement, putting your kids through school, and setting something aside for the what-ifs. It can be easy to put your legacy on the back burner. I want to talk to you about an easy, affordable way to plan with whole life insurance. It ensures you can leave something for your family, and you can pay for your policy in just 10 or 20 years. How does that sound?

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