

# AGENDA

IUL Masters Academy Training | June 7-9, 2021

## SESSION 1

Why IUL Now?

*The evolution of retirement planning and advising*

Solving Your Client's Pain: IUL in Today's Market

*Addressing the pains of taxes, market risk, and legacy*

## SESSION 2

Compliant Conversions

*Qualifying prospects and funds for the conversion strategy*

Evaluating Tax, Income & Risk for Your Clients

*Incorporating 'tax-free' to create powerful retirement income plans*

Overcoming Objections

*Answers to the most common objections*

## SESSION 3

From the Actuary: The Mechanics of IUL

*The nuts and bolts of IUL, from policy loans to case design*

Prospecting with Today's IUL Story

*Attracting new clients and new wallet share*

Strategies in Action

*Real outcomes from real clients and advisors*