AGENDA

IUL Masters Academy Training | September 9 - 11, 2020

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