

Kitchen Table (KT)

Outcomes

- Financial Needs Analysis Booked
- Life Insurance Application Closed
- Set the stage for Quality Referrals

Steps

FORM (Family. Occupation. Recreation. Motivation) - Build rapport. People do business with people they know, like, and trust.

Transition to the body of the appointment by reminding them why you booked.
"When we talked on the phone...."

If alone: Can I show you what I do?

If with a recruit: What did ____ tell you about today?

Primerica: Have you heard of Primerica? who we are, our legitimacy, some stats

We have 2 jobs:

- 1: Job 1 -Help people make and save money.
(Follow Crusade Brochure Bullet Points here)

FNA- A roadmap. Having a plan is better than NOT having a plan, agree?

- Usually \$1.1K (average)
- Do you have a written plan or are you just doing the best you can?
- Would you like one?
- We do it complimentary

Commitments:

If I **CAN** deliver on my promise :

- 5-10 Referrals
- Implement Strategy

If I **CAN'T** deliver on my promise:

- No referrals
- Don't implement strategy

Set the FNA Appointment

What you need

- Investment Statements
- Insurances
- Debts

Grab Tonight

- Prior statements
- IRA/investments
- Life insurance (follow "Why Primerica at the KT" Closing Process)

- 2: Job 2 - Bring People on Part Time to work from home/Run their own business