ADDING A LITTLE LIFE (AND RETIREMENT) TO THE PARTY

Simple Strategies for Transitioning Your Clients To Your Financial Specialist

Course Description:

In most agencies, the conversation about auto and home flows easily. But when it comes to life insurance and retirement solutions, too many agents and staff hesitate — worrying they'll "mess up the sale," that the call has already gone too long, or simply not knowing how to start.

This highly interactive session tackles those roadblocks head-on. Through open dialogue, real examples, and role play, Greg Gray equips your team with the confidence and language to bring life and retirement into the conversation naturally. Participants quickly discover that these aren't awkward add-ons — they're essential, transformational conversations that protect families and deepen client relationships.

Participants will learn:

Key Insight #1: The Five Roadblocks to Life & Retirement Conversations - Uncover the top five reasons agents avoid these discussions — and how to overcome them with confidence.

Key Insight #2: How to Start Without Stumbling - Practical talk paths and transition language to raise life and retirement naturally, without feeling "salesy."

Key Insight #3: Objection Handling That Builds Trust - Learn role-play tested responses to the most common client objections ("I already have coverage," "I don't have time," etc.).

Key Insight #4: Tone and Timing Matter - Why when and how you bring it up matters just as much as what you say — and how to consistently strike the right balance.

Key Insight #5: Turning Hesitation Into Action - Strategies to shift from discomfort to confidence — making life and retirement conversations a consistent part of daily client interactions.

💡 **Why This Is Important:**

Over 100 million people in the U.S. lack life insurance, leaving families vulnerable to financial devastation. Agencies that avoid these conversations are missing their chance to truly protect clients — and to build deeper, longer-lasting relationships. This session equips your team to bring life and retirement to the forefront, ensuring customers are protected the right way, not just the easy way.