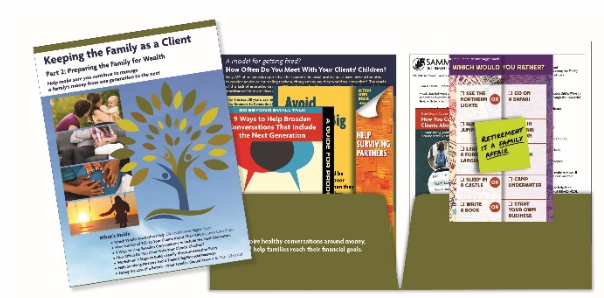
Help keep clients from one generation to the next.

Did you know 80% of heirs fire their parents' financial professional at inheritance?[1] The amount of time invested in a family can simply go "poof!" when that business is transferred out. How can you help yourself stay in the 20% of financial professionals that KEEP the business?

As a way to help, Sammons Retirement Solutions® is offering *Preparing the Family for Wealth* to offer some of the tips and techniques of financial professionals who don't get the transfer notices.

Among the resources you'll find are:

- Conversation starters to help clients spot bigger goals;
- Key tactics to help you connect with both younger and older family members;
- A 4-step process that can help create a family's unique vision and mission story;
- A 16-point checklist to help prepare heirs, as well as surviving partners, to overcome loss.



Request ***Preparing the Family for Wealth*** to help make sure you'll continue to work with a family from one generation to the next. After all … the easiest families to prospect are the ones you already have as clients. Call the Sammons Retirement Solutions Sales Desk at 855-624-0201 or visit my.srslivewell.com/28828 to get your complimentary copy.

[1] "What the Coming $68 Trillion Great Wealth Transfer Means for Financial Advisors." CNBC. October 21, 2019, https://www.cnbc.com/2019/10/21/what-the-68-trillion-great-wealth-transfer-means-for-advisors.html.

As independent financial professionals, it is up to you to choose whether any of the sales concepts contained in these materials might be appropriate for use with your particular sales strategy and clients. Please note that Sammons Retirement Solutions® does not require you to use any of these sales concepts; they are resources that can be used at your option for your own individualized sales presentations if appropriate for the particular client and circumstances.

1848792