

It's our service that produces.

In This Issue:

[Serving Your Business Owner Clients](#)

[What Percent of Your Client Assets are Unemployed?](#)

[News You Can Use](#)

[AMG Recipe Corner](#)

Other Important Links

[Happy Birthday to Our Agents! \(May Birthdays\)](#)

[Monthly Rankings through March and Leaders Conference Standings](#)

In Case You Missed It...

[Sam Massey, Jr. It Was the Best & Worst of Times](#)

[Megan Pfeiffer The Time for Annuities is NOW!](#)

[Tina Kukanza Asset Protection for Inherited IRAs](#)

AMG Agent Resources

[Building A Business Plan](#)

[Marketing Plan Template](#)

Serving Your Business Owner Clients

Barbara Hawley



I recently had the privilege of attending the Agents' Marketing Group 2017 Leaders' Convention in Tucson, AZ and came away with an old sales idea, presented in a most impactful manner. It was a "napkin" presentation per the presenter, Mark Berry of Lincoln Financial Group.

In order to solve a business owner's problem, we must first "stop selling and start solving" their problems; and how would we know what problems they have, perceived or otherwise if we don't ask the right questions?

Question: What are the odds of death for a business owner and/or his/her key employee? Was your answer one out of one? That is the answer. Everyone will die, so the questions are "When?" and "How prepared are you?"

I challenge you to spend some time preparing for your next opportunity sitting in front of a business owner. Prepare yourself with the right fact finders to uncover needs and opportunities and to give the business owner an understanding of the vulnerabilities partners, spouses and employees could face given untimely deaths for which the business owner is not prepared.

The following list highlights key topics you should be prepared to discuss. Surely one of them will apply to your business owner opportunity:

- Key Person
- Buy Sell - Cross Purchase, Entity Purchase or Trusteed Purchase
- Estate Equalization through Business Succession and Transfer

I have attached a Sales Presentation illustration regarding a [sample Executive Bonus solution](#). Executive Bonus (Section 162 Bonus Plan) can be a solution for Key Employees both from a protection standpoint as well as retaining talent.

Also attached are two Business Fact Finders - [one detailed](#) and [one abbreviated](#) to gather the data needed to uncover the business owner's problems and to begin to prepare solutions. Hyperlink two fact finders:

Please don't hesitate to reach out to me for resources to prepare for

What Percent of Your Client Assets are Unemployed?

North American



Today, our nation's unemployment rate is hovering around 4.7%. For most economists, this represents an excellent rate of unemployment or near "full employment." This is great news for our country, but let's think about the financial industry for a moment. What about your client's assets? Are they at "full employment"?

[Click here](#) for the full article.

News You Can Use

Stephanie Hassler, AMG

Second quarter is in full swing. Spring is in the air and changes, they are happening! AMG is happy to announce Case Management/New Business for Life and LTC is now handled exclusively in our Athens, GA, office. Annuities continue to process at our Atlanta location. Life apps can be forwarded as indicated below:

Email: Lifeapplications@amgida.com

Fax: 706-546-0564

Mail: 1374 S. Milledge Ave., Athens, GA 30605

There are also a few Carrier updates that you need to be aware of as well as common errors we are seeing while scrubbing applications for accuracy. [Click here](#) for Stephanie's full article.

AMG Recipe Corner

From the Kitchen of Willie Jester

This classic Southern staple will have you ready for all of the upcoming barbecues and springtime cookouts you and your families attend. We're looking forward to trying Willie Jester's [Deviled Eggs](#) recipe as soon as possible! We hope you'll enjoy it, too!