

Pension Maximization Discovery Phone Call Form

Call Date: _____ Call Time: _____ Site: _____
Full Name: _____ Cell Phone #: _____

Hello _____, this is _____ with National Life Group how are you? Great. I am calling for your 5-minute pension maximization discovery call. I want to start by asking you some questions to better serve you, OK? Great. How is your day going so far? Excellent. I don't want to take much of your time so I will get started now. (First name) I want to start by commending you for looking to secure your financial future and that of your family. I'll start with some basic questions:

Age: _____ Married? _____ Kids? _____ Y.O.S.: _____ Retirement age: _____
Y.O.S. @ retirement? _____ Expected pension %: _____ %
Desired retirement income %: _____ % (combined pension + additional income)
Do you currently have life insurance (outside work)? (circle one) Yes or No
Current type of life insurance (term, permanent): _____
Current life insurance face amount: _____
Currently saving for retirement outside of pension? (circle one) Yes or No
If so, how much per month? \$ _____ Product (Def. Comp, 403(b), etc.)? _____
Use any tobacco product? (circle one) Yes or No
Any significant medical/health issues: _____
Any medications: _____
Monthly contribution to achieve desired income % goal: \$ _____
D.O.B.: _____
Date for follow-up appointment: _____

Well, that's all I need for now. I want to thank you for your time. I look forward to speaking with you on (date of next appointment) at (time of appointment) to share with you the results of your retirement review as well as your options. Do you have any questions for me?

Great. I look forward to speaking with you soon. Thank you. Bye.

Notes: _____

