

Opportunities You May Be Missing

When personal and estate cases are written, what's next? Why not take advantage of underwriting that has already been completed and a client that is clearly looking to handle their insurance needs at this time? Cross-selling should play a vital role in your sales technique.

- Take the time to find out if your personal cases have any need for business insurance...buy-sells, key person, business continuation plans, qualified or supplemental retirement plans, etc.
- Do your business owners have sufficient personal coverage for themselves and their families?
- Have your clients consid-

ered protecting their assets (personal and/or business) with long-term care insurance?

- Do your clients have any investments that have been suffering in the recent economic downfall? Could they benefit from placing their funds in a fixed annuity?

These are just a few of the questions that should be presented during a review of your client's coverage and finances. Be there for your clients to make sure they have the protection they need before your competition does!

Feel free to call our Marketing Department for assistance and materials that may help you.



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