



Genworth®
Financial

Insurance for living.
Solutions for life.™



3 STEPS TO SUCCESSFUL CLIENT CAMPAIGNS

Step 1 – Goal Setting

Setting a goal simply allows you to specifically state what you want to accomplish in your business with this campaign. Take a few minutes to determine your objectives. Are you looking to increase your production? Establish client loyalty? Your agency may have recommendations.

Write the goal for your campaign here: _____

Step 2 – Client Assessment

Clients are unique and their retirement plan should be tailored to their particular needs. Use this worksheet to help assess each client's situation. If you don't know the answer to these questions, use them as a discussion guide.

1. Age: _____
2. Current Income Level – *Check one:*
 - Less than \$75,000
 - \$75,000 – 150,000
 - \$150,000 – 250,000
 - \$250,000+
3. Desired Retirement date – *Check one:* in the next 5 years 5-10 15+
4. Potential Sources of retirement income – *Check all that apply:*
 - Social Security estimated benefit: _____
 - Pension estimated benefit: _____
 - Other: _____
 - Other assets – *Check all that apply:*
 - Home Stocks & Mutual Funds Cash Other Sources
5. Desired retirement lifestyle (*Describe how the client wants to live in retirement*):

Continues on reverse

6. Client concerns about retirement – *Check all that apply:*
- Changing interest rates
 - Having enough money to retire
 - Ensuring their money lasts as long as they do
 - Transferring wealth to beneficiaries
 - Other _____

Step 3 – Client Communications

Once you’ve determined your clients needs and concerns, you are ready to develop your communication plan and present a Plan for Living to your clients.

Choose your communication method:

- Phone
- Letter
- Face-to-Face meetings

Contact client:

1. Meeting Date: _____

2. Client Presentation:

Based on Step 2 determine what you’ll present to your client.

- Concerned about income
- Concerned about growth
- Other _____

You may choose to utilize the marketing materials shown:



(form #37540BGA)



(form #40977)



(form #36714BGA)

3. Ask for the business once you have determined which product is appropriate.

4. Follow-up Date: _____

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Contact your company representative to request more tools and strategies from the Genworth Financial companies to help create a Plan for Living for your clients!

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