



BOLD bar napkin script

You can leverage the power of our Business Owner Life-stage Design (BOLD) campaign using a simple bar napkin to break the ice with business owners.

The BOLD bar napkin takes its cue from a time-tested life insurance sales method. An agent explains to a client how life insurance works by drawing a simple XY graph on a napkin, identifying a policy's premiums, death benefit and cash value growth. This sales technique is called the "Napkin Talk." The BOLD Napkin Talk is even easier - it's already drawn for you.

How to use the BOLD bar napkin

1. Schedule a client event (golf outing, beer tasting, charity event, etc.)
2. Your caterer will likely provide napkins and small plates for cocktails and hors d'oeuvres. Let them know you'd like to use your napkins.
 - Find out how many napkins they typically use for your type of event.
 - Order that quantity and more from our literature center well in advance of the event. BOLD materials sometimes go out of stock due to their popularity.

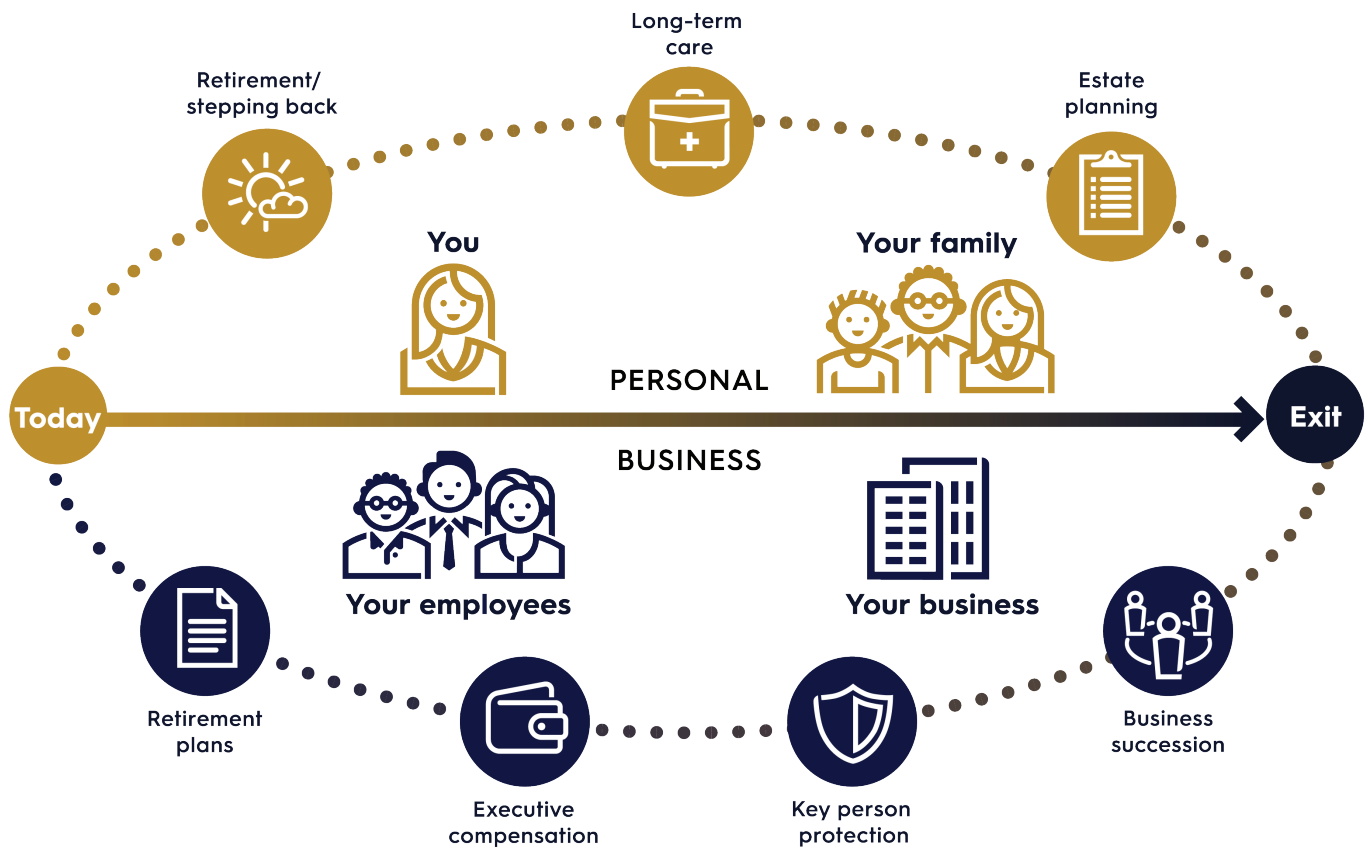
Opportunity #1

Upon seeing the napkins you provide, the caterer will likely inquire about BOLD. This is your first opportunity to practice your script.

4. Clients will be curious about the BOLD diagram on their napkin. This is your cue.

The pitch

"I can show you on a bar napkin what I can do for you, your family, your employees, your business and your estate."



Alternative script

You can use this shorter script in other situations with potential clients, such as a golf course or elevator:

"We can address your retirement and protecting your estate [circle **Retirement/Stepping back** and **Estate planning**]. We can talk about offering retirement plans in your company [circle **Retirement plans**]. Plus we can help you keep your top employees from jumping ship to your competitor [circle **Executive compensation**]; or protect your company in case a key person dies [circle **Key Person protection**]. And we can develop a business succession strategy to help protect you in case you're forced to leave the business and prepare for the day you decide you want to leave the business [circle **Business succession**]."

The script

"BOLD, or Business Owner Life-stage Design, is a system for providing life insurance solutions to help you grow your business."

[place napkin on the table, facing your client – be sure to practice drawing upside-down!]

"The BOLD strategy starts today and ends when you exit your business." [circle or point to **Today** and **Exit**]

"As a business owner, you face many financial decisions. In addition to growing your business now, you must also think about whether you will step back one day or retire altogether [circle **Retirement/Stepping back**], and protect yourself in the event of chronic illness as well." [circle **Long term care**]

"At the same time, you want to provide some kind of retirement plan for the people who work for you. [circle **Retirement plans**] And some of those employees are probably critical to the ongoing success of your business. You also want to make sure you reward them as an incentive not to leave you for your competitor [circle **Executive compensation**], and help protect your business from their premature death." [circle **Key person protection**]

"Eventually, you will hand over the business you've built to someone else [circle **Business succession**], and make plans for passing your accumulated wealth to your heirs." [circle **Estate planning**]

"This sheer number of decisions and their complexity can paralyze a business owner. However, ignoring these issues won't make them go away. You need answers to questions critical in the decision-making process."

"If we decide to work together, we can determine which of these concerns is most important to you in just one visit. As we create a solution, we can address your other concerns. Eventually we will have strategies in place to help protect..."

...you, [make a checkmark next to "**You**"]

...your family, [make a checkmark next to "**Your family**"]

...your employees, [make a checkmark next to "**Your employees**"]

...and your business." [make a checkmark next to "**Your business**"]



Learn more

Want to take BOLD action into the business-owner market?
Contact our Advanced Sales Team:

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