

ELEVATE WORKSHEET



A-Z Life Appointment Process

The Customer's Goals

Conducting a Needs Analysis

Product Selection

Uncovering the Customer's Budget

Present the Plan

Underwriting and Delivery

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Upcoming Classes

(All classes Eastern time)

- ❖ July 8: Quick Hit - Developing a Winning Mindset
- ❖ July 13-15: Evolve (July)
- ❖ July 15: Quick Hit - Universal Life Overview
- ❖ July 16: Elevate - Turning Leads Into Quotes
- ❖ July 20-22: Foundations (July)
- ❖ July 22: Quick Hit - The Importance of the Sales Matrix
- ❖ July 23: Elevate - Uncovering Customers' Needs

Trophy Club Links



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