

Using life insurance for retirement planning

Midland National[®] Life Insurance Company

Opportunity tracker worksheet

You can use this worksheet to pick five clients that might benefit from this sales idea.

Life insurance not only provides death benefit protection, it can also help with financial needs during retirement. A permanent life insurance policy can be structured to help supplement your client's retirement income.

If your clients...

- Have a need for death benefit protection
- Are between the ages of 30 to 55
- Have a middle to high income
- Are self-employed, corporate-employed, or in a partnership
- Are concerned about their family's financial needs if death occurs during working years
- Are looking to help supplement retirement income in their retirement years

Please list the names of five clients who fit the above descriptions and whom you would like to help meet their life insurance needs and retirement income goals.

First Name, Last Initial	Age
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
_____	_____
Agent Name	Date

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