

# Buy-sell Sales Concept

## Client profile

**Name:** \_\_\_\_\_ **Agent code:** \_\_\_\_\_

**Email:** \_\_\_\_\_

Whether your clients own a large company or a small family-operated business, the success of any business depends on smart strategy and planning.

### LIFE INSURANCE CONCEPT FOR BUSINESS OWNERS

#### Protect your business clients from...

- Unintended or unwelcome transfers of ownership.
- Heirs being stuck with an inheritance they can't use.
- Unsecured funding of the transfer of ownership of the business.
- Potentially lengthy probate courts and lawsuits.



#### ... Funding a buy-sell agreement with life insurance can be the answer.

List the names of business owners who fit the above profile and whom you would like to help meet their life insurance needs and financial goals.

<b>Business name:</b> _____	<b>Estimated business valuation: \$</b> _____
<b>Owner name:</b> _____	<b>Age:</b> _____ <b>Gender:</b> _____ <b>Tobacco:</b> Y/N <b>State:</b> _____
<b>Percentage ownership: %</b> _____	<b>Retirement age:</b> _____

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As independent financial professionals, it is up to you to choose whether any sales concept might be appropriate for use with your particular sales strategy and clients. Please note that Midland National does not require you to use any of sales concept; they are resources that can be used at your option for your own individualized sales presentations if appropriate for the particular client and circumstances.

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