

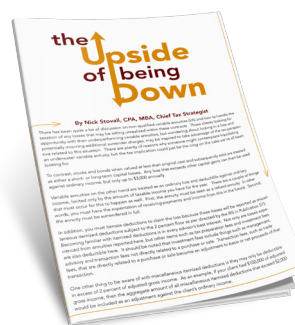
the
Upside
of being
Down

Go from **RED** to **BLACK**

WEB EXTRA

VARIABLE
ANNUITY
LOSS
ANALYSIS

See gDrive
to download
sales system



Variable Annuity Loss Analysis GT

Millions of Americans are holding onto underperforming variable annuities (VA), looking for an opportunity to rid themselves of exposure to further losses. There are numerous reasons why someone might contemplate liquidating an “underwater” VA, and the tax benefits may be the icing on the cake. Our “Variable Annuity Loss Analysis” sales system is the key to helping your clients and prospects make informed decisions about liquidating their underwater VAs.

GET THE FACTS

- Program Checklist
- “The Upside of Being Down” White Paper
- Training Video
- IRS Publication 575 Highlight Guide

PROFESSIONAL PROSPECTING TOOLS

- Mini-Seminar Presentation Slides and Complete Script
- Sample Variable Annuity Loss Quick Calculator Analysis
- Appointment Request Card
- Sales Flyer
- Prospecting Letter

POINT-OF-SALE PRESENTATION

- Gradient Tax Consumer Brochure
- Data Intake Form
- Variable Annuity Loss Analysis Handout
- Sample Variable Annuity Loss Analysis and Tax Comparison Report
- Client Engagement Letter
- Tax Projection Checklist
- Referral Acknowledgement Letter
- Secure and Simple Electronic Submittal
- Variable Annuity Loss Analysis and Tax Comparison Report

POWERFUL THIRD-PARTY RECOMMENDATION

- CPA Recommendations, Providing Unbiased Third-Party Opinion from a Fiduciary
- Personalized CPA-Prepared Letter
- IRS Publication 575 Highlight Guide