Protective

# Life Insurance Awareness Month

## #LifeGoals: Maximizing customers’ legacies with ease

**66% of Americans purchase life insurance to transfer wealth across generations.**[1] That means finding life prospects could be as easy as spotting customers who are missing legacy planning from their financial goals.

**September is Life Insurance Awareness Month**, the perfect time to talk to your customers about how life insurance can help them protect their loved ones and leave a meaningful legacy.

### Use these two tips to find ideal customers and start a legacy planning conversation.

### 1. Easily spot potential customers

Look for these customer scenarios when identifying prospects.

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| 50 to 85 years of age | Have “in trust for” or “POD” accounts | Consistently renew their CDs |
| Want to lower their annual taxable interest | Have large checking or savings account balances | Talk about their children or grandchildren |

### 2. We make the next step easy

Introduce the simple Ten Minute Legacy℠ sales process to help customers maximize their legacy — and maximize your business.

**Additional information on next page.**

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# Talk to clients about protecting their loved ones with the Ten Minute Legacy

the TEN MINUTE LEGACY℠

## Benefits to highlight

- One payment equals a larger death benefit for loved ones
- Transfer funds income tax-free
- No lengthy processes like other legacy planning products

## Easy application process

- No medical exam required[2]
- Only 4 qualifying questions
- Protective will call with an approval decision in 10 minutes or less.

### What #LifeGoals will you achieve this September?

It's up to you to remind your customers of the importance of creating a legacy plan for the next generation. Take advantage of Life Insurance Awareness Month to start a conversation about the Ten Minute Legacy today.

**We're here to help you reach your #LifeGoals during Life Insurance Awareness Month and beyond. Contact your wholesaler or call 800-500-2995 to get started.**

[1]LIMRA Facts About Life 2020

[2]Eligibility is subject to meeting Protective Life's qualification requirements. Additional underwriting is required if the application does not qualify for a 10-minute approval decision.



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