# Life Settlement

## Six Steps to Selling

CAPITAS FINANCIAL, LLC
INTERNATIONAL LIFE BROKERAGE

Client Name: ______________________________ Date: _______________

| Step 1 | Step 2 | Step 3 |
|---|---|---|
| **Interest & Needs** | **Probe & Verify** | **Qualification** |
| o Introduction to life settlements<br>o Inquire/define client's need or interest for life settlement<br>o Overview services with client<br>o Explain life settlement process | o Confirm Client's need for a life settlement<br>o Define client's priorities<br>o Explain services provided to client | o Determine client's level of interest<br>o Review all life settlement requirements<br>o Manage client expectations by explaining process |
| **Marketing Materials & Documentation** | **Marketing Materials & Documentation** | **Marketing Materials & Documentation** |
| o Capitas Life Settlement Brochure | o Preliminary Inquiry form | o Disclosure form |
| **References/Notes** | **References/Notes** | **References/Notes** |
| o Article from New York Times<br>o Article from Wall St. Journal<br>o Article from Journal of Fin Profs. | | o Collect APS, in-force ledger and life expectancies |

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Client Name: ______________________________ Date: _______________

| Step 4 | Step 5 | Step 6 |
|---|---|---|
| **Solution Design** | **Closing** | **Delivery** |
| o Define services<br>o Review all required information<br>o Develop a timeline | o Collect life settlement bids<br>o Qualify the bids<br>o Facilitate<br>o Solve Problems | o Review results and explain to client<br>o Review allocations<br>o Opportunity for cross-selling |
| **Marketing Materials & Documentation** | **Marketing Materials & Documentation** | **Marketing Materials & Documentation** |
| o Preliminary estimates | o Closing check list<br>o Review other products and services available | o Post closing check list<br>o Post closing personal note<br>o Data base inputs<br>o Metrics review |
| **References/Notes** | **References/Notes** | **References/Notes** |
| o Life expectancies<br>o Pricing | | |