What's Your PSAT Score?

by
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Long-Term Care Producer's Summit

Atlanta, Georgia

Bucket and Draw Program

Justin Case
123 Sesame St.
Gotham City, OZ 90210

1234

dollars

Signature

Justin Case
123 Sesame St.
Gotham City, OZ 90210

1234

_____

dollars [____]

_____

_____   Signature

$300,000 Bucket and $6,0000 Monthly Draw

3%   Compounding

5% Compounding
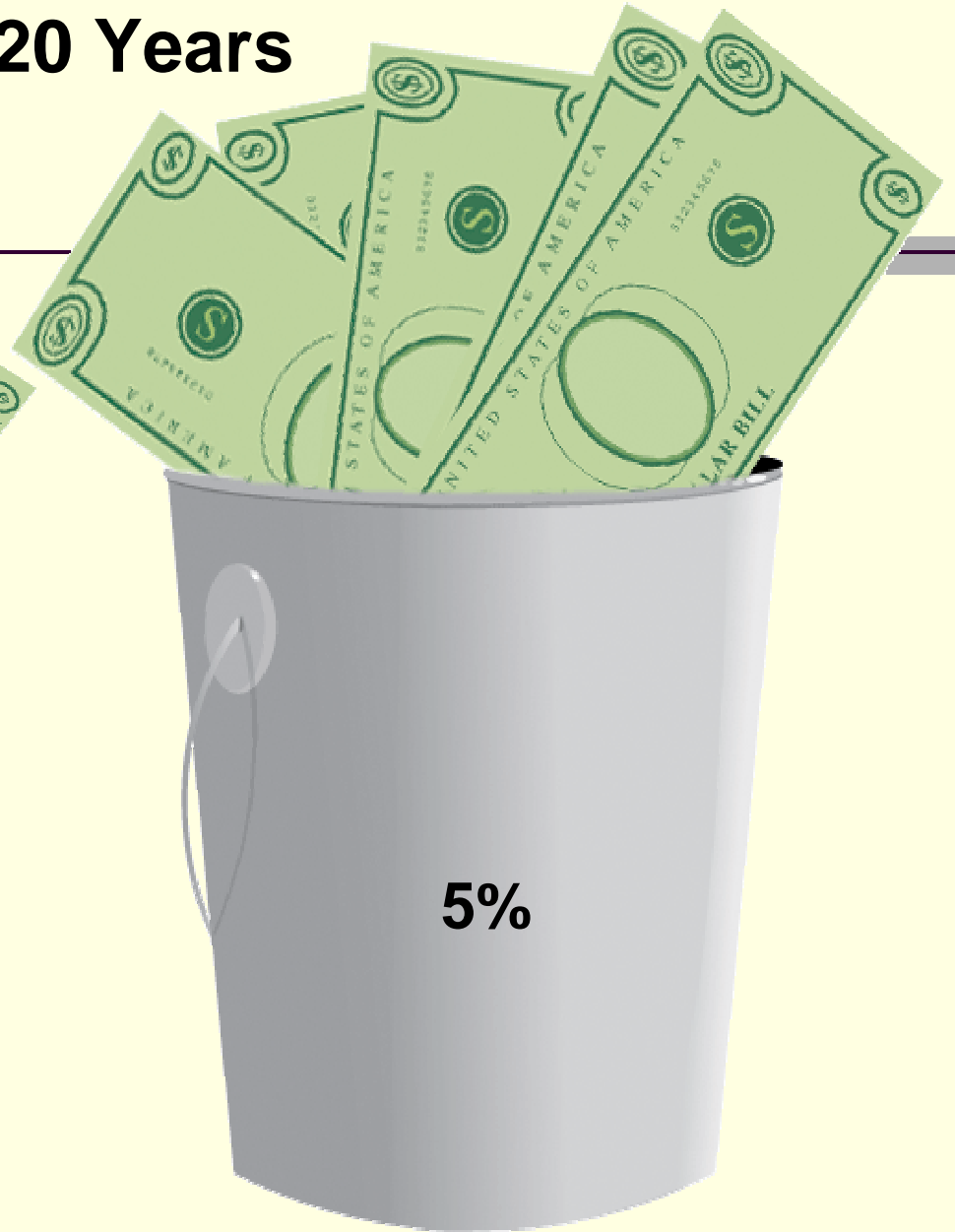
In 10 years

3%

5%

$403,175 and $8,064 monthly $488,669 and $9,773 monthly

In 20 Years

3%

5%

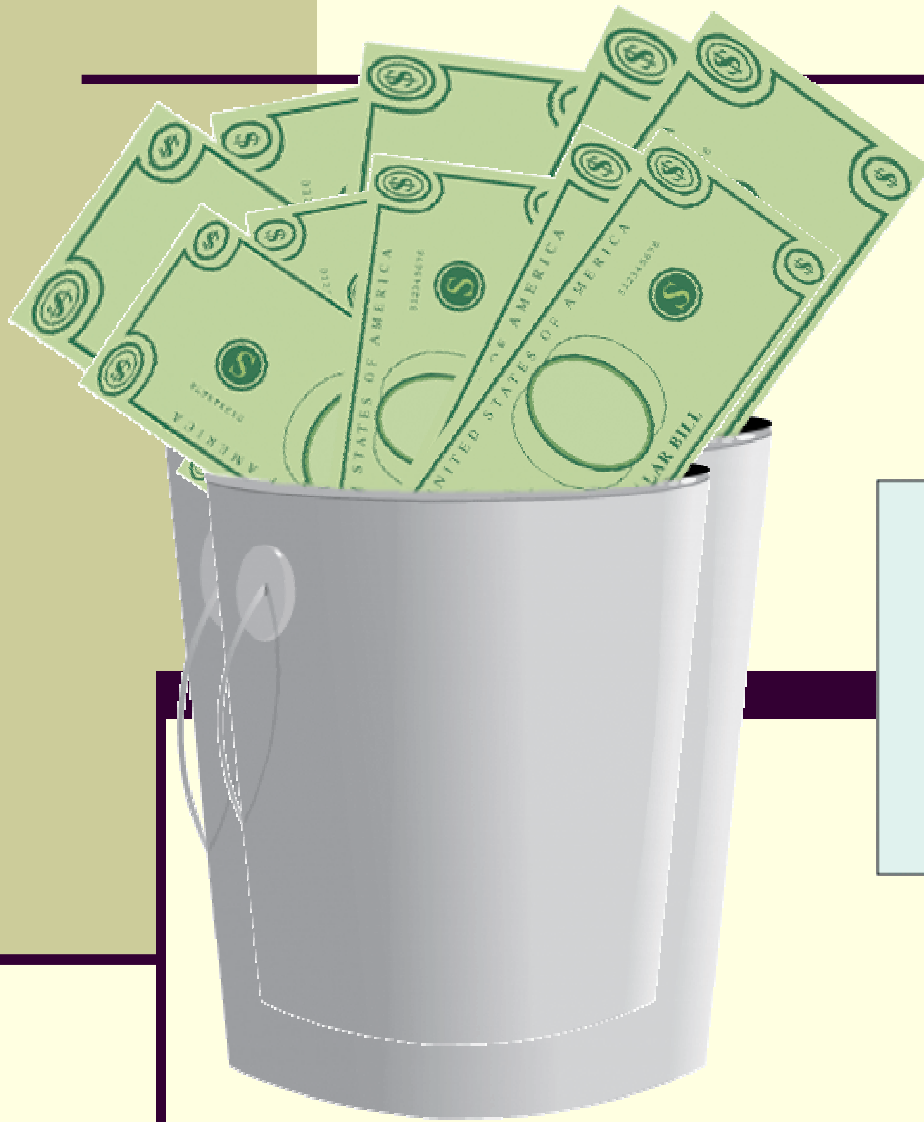**$541,834 / $10,837 monthly**   **$795,989 / $15,921 monthly**

Effect of Claims

$403,175   **$8064 Monthly Draw Available**

Effect of Claims
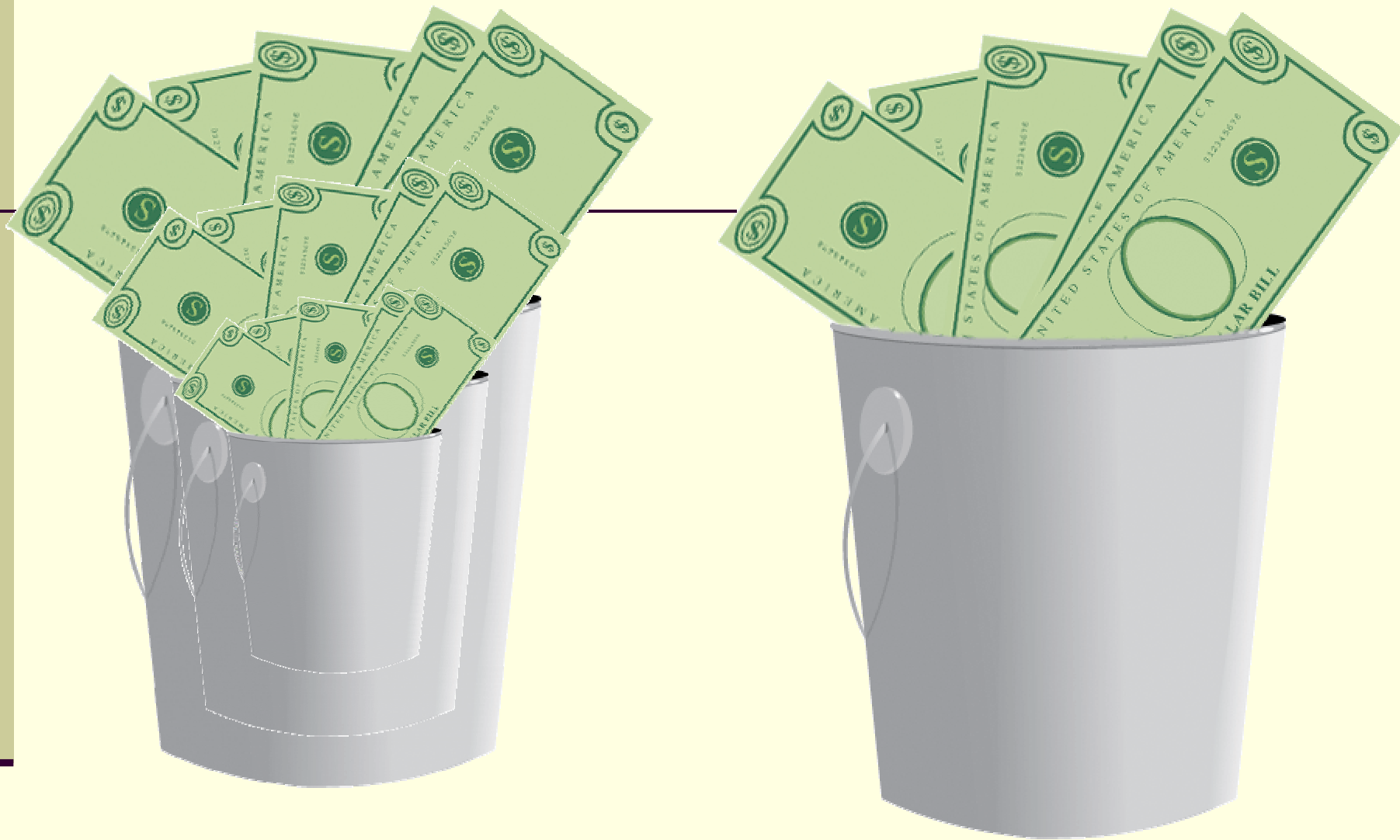
SHARED CARE

SHARED CARE

Restoration of Benefits

PSAT

PROSPECTING

SALES

ACHIEVEMENTS

TRACKING

What's Your PSAT Score?

Name: _____ **Date:** _____

P–Prospecting S–Sales A–Achievements T–Tracking

Rate yourself on each statement below from: 0-worst to 10-best:

		Your Score	Best Score
1.	I have identified the pre-qualification traits of my ideal client, and use this criteria when I meet with a prospect.		10
2.	I have set a minimum compensation amount that I'm willing to accept before I agree to work with a prospect or client.		10
3.	I block out a set time each week to schedule sales appointments.		10
4.	I keep cumulative statistics on sales results, and set specific sales goals each year.		10
5.	I know the amount of renewal commission income I receive from each client.		10
6.	I am driven more by purpose in my work than money.		10
7.	I have an (A-Z) list of all my client and prospect accounts.		10
8.	I have designation levels for each client to determine the frequency of contacts.		10
9.	I have a follow-up tickler system that I use each month to identify clients and prospects who have agreed to meet at a future date.		10
10.	I can sort each name in my client file by (prospects, clients, products sold, pending business status, claims etc.)		10
	Total Score		100%

PRE-QUALIFY

R - RECOGNIZE NEED

A - ABILITY TO PAY PREMIUM

I - INSURABLE

S - SALEABLE

E - ENJOYABLE TO WORK WITH

Right Fit Client

- **Married**
- **Empty Nesters 55-65**
- **Income $50,000 +**
- **Assets $250,000.00 or More**

Right Fit Corporate Client

- **Closely Held Business Owner**
- **50 Employees or Less**
- **Profitable Entity**
- **C-Corporation Tax Status**

Minimum Check

$ _____

Prospecting Appointments