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Title: How to Become a Highly Effective DI Producer
Presenter: Michael J. Sir, RHU
Date: Wednesday, September 21, 2022
Time: 1:00 – 2:00 PM
Location: Bavaria Downs | 3919 Bavaria Rd, Chaska, MN 55318

CE Credits: This educational offering is APPROVED by the Minnesota Commissioner of Commerce as satisfying 1.0-hour of Standard classroom credit toward continuing insurance education requirements for each hour attended.
CFP: 1.0-hour Standard credit PENDING
CLE: 1.0-hour Standard credit PENDING
A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Level of Complexity: Overview

Course Description:

Most Insurance and Financial Advisors struggle with or avoid the topic of Disability Insurance. It's not for the lack of belief that Income Protection is an important part of a financial plan, but rather it's the lack of training and presentation tools to help guide them and their clients through the DI conversation.

How to become a Highly Effective DI Producer will show you how to position the DI conversation properly, expose the gaps and shortfalls of existing coverages and show solutions that are easy for your client to understand.

If you would like to learn how to become vastly more effective in this critical area of planning, you will not want to miss this session.

Learning Objectives:

- Learn how to position the need for Income Protection
- Help your clients understand the gaps and shortfalls of any existing coverages
- Present solutions that your clients can easily understand
- Put premium into perspective

Outline:

Introduction/Overview: 5 Minutes

Positioning (The Need):

- Optimism Bias – addressing the obstacles 5 Minutes
- Statistics and Stories 5 Minutes
- Visual Learning 5 Minutes

Demonstrating (The Problem):

- Understanding Current Coverages 5 Minutes
- Gaps and Shortfalls 5 Minutes
- Provisions and Policy Language 5 Minutes

Presenting (Solutions):

- KISS – Keep it (the) Solutions Simple 5 Minutes
- Test – Solutions and Options 5 Minutes

Perspective (Premium):

- How to put Premium in to Perspective 5 Minutes
- Cost of Waiting 5 Minutes

Conclusion: 5 Minutes

Total Time 60 Minutes

Instructional Materials for Registered Attendees:

Handouts, if any, will be included in the handout tab at Finaroo.org

Examination & Answers: No exam