Northwestern Mutual Language
"The Approach"

Acknowledge the Nominator

Thank you Mr. /Mrs. Prospect for taking the time to meet with me today. As I mentioned on the phone, I work with (nominator) and he/she said some great things about you. Did (nominator) get a chance to share with you the type of work my team & I do at Northwestern Mutual?

(If Yes) Great, what did (nominator) have to say?

(If No) No problem, I know you are both very busy.

Set the agenda

Mr. /Mrs. Prospect, before we get started today, as I was coming here today, is there anything specific you wanted to make sure we cover?

99% of the time, the answer is no.

Rough Agenda

Ok, with that said, here is what I would like to focus on for today.

1. Introduce myself & my team to you.
2. Give you an idea on how we work with our clients.
3. Learn a little more about you and your personal, professional, and financial goals.
4. Talk about next steps if there is anything further you want to look into.
5. Lastly, brainstorm with you on other great people you might know that I could introduce myself to.

Overview of Financial Security

With that said, here is what I do. I'm a Financial Representative with Northwestern Mutual. I use a financial planning process to help people create financial security for them and their family. First, we focus on defensive planning, making sure you have a backup plan if everything doesn't go according to plan. Once you do a good job there, we focus on the wealth accumulation. Helping you save, in a tax efficient way, for college, retirement, or any future need. Lastly, when you are ready to retire, we help you with preservation and distribution.

Making sure you don't out live your income and everything you worked hard for goes to your loved ones.

Three-Step Approach

First of all, what I would like to do is, take some notes and learn what's most important to you, personally, professionally, and financially.

Secondly, if there are some ideas you want to take a further look at, I will take them back to the office, put some ideas together for you, and get together and share them with you.

Lastly, if you like our ideas, we work together, and then I like to meet with my clients once or twice a year.

Relate with them on their time or position in life.

What I do for other clients I have like you is, really help them focus in on risk management, and learning how to save, really educating you on steps to take to build your financial future.

Lead into the Fact finder

With that said, is there anything you would like to focus on before we get started today?

Abbreviated Factfinder

Fact Finder –

I. Focus on the goals briefly. Use 3-5 year goals.
II. Fill out pages; 1, 2, 3 (just savings philosophy) 5, 6, 7 (briefly) 8 (DI) 13.
III. Page 13, always get dollar amount and set the appointment
IV. Prospect

Round 4

Do an insurance and savings concept. Run a $75k/50k/25K 65Life

Next steps

Prospect