Colburn Financial

BOOTCAMP

OUTLINE

Take Notes

Create Notes

DAY 2 – Part 1 (Prep-work)

Review of Day 1 – What's the purpose of phone call?

_____

What's the objective of the meeting in the home?

_____

What are the 2 factors underwriters review?

1. _____

2. _____

What do you use to document their information?

_____

When talking to your client ask:

What _____ are you currently on and have you been on any ___ ____ _____?

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

Take Notes

Create Notes

Mark's 5 top Go-To Companies & Reasons

1. Reason:_____
    a. Co:_____
2. Reason:_____
    a. Co:_____
3. Reason:_____
    a. Co:_____
4. Reason:_____
    a. Co:_____
5. Reason:_____
    a. Co:_____

What's the order of consultation after reviewing the CQ?

1. _____
2. _____
3. _____

Take Notes

Create Notes

Part 2 (Presentation)

What are the key components to do during each meeting?

1. _____

2. _____

What is the R.E.A.L. System?

R _____

E _____

A _____

L _____

Who are you going to Role-play with Today??

_____

Notes section for talking points noticed during the presentation.

_____

_____

_____