



## Client Welcome Packet ©

### DESCRIPTION

Immediately after closing a sale, a wise agent will enclose 3 Items within an 8.5x11 envelope and mail a nice Welcome Packet to a new client.

- ✓ THANK YOU LETTER
- ✓ SPONSOR SHEET
- ✓ MEMORIAL GUIDE

This Client Welcome Packet only costs roughly \$1.25 to mail anywhere in the United States. Such a small gesture of gratefulness on the part of an agent to a new client can make a BIG DIFFERENCE in terms of “Taken Rate” (1<sup>st</sup> premium paid). A Welcome Packet arrives in a new customer’s mailbox within 3-5 days after purchasing life insurance. This is a **highly effective tool** to squelch any “Buyer’s Remorse” syndrome a customer may be feeling immediately after purchasing coverage.

> **Thank you Letter:** *A template letter of thanks in Microsoft Word and Pdf format. It lends to a new client an agent’s contact information, and when their policy will arrive in the mail from the insurance carrier. An agent simply fill-ins their own contact info, as well as the client’s insurance company name.*

> **Sponsor Sheet:** *A printable Pdf document listing several spaces for a client to fill-in, as an option, if they would like to refer other family members or friends to an agent’s professional services. Some agents paperclip a self-addressed, stamped envelope to the Sponsor Sheet, to make it as painless as possible for a new client to send referrals back to an agent in the mail.*

> **Memorial Guide:** *A printable Pdf, 2-page Guide, as a FREE GIFT, to your new client. It organizes the Final Wishes of a client into one, written location. Memorial Guide discloses a client’s funeral arrangements, financial holdings, expresses a comforting message to family, a hope-filled Scripture verse, as well as record key locations of important documents, such as mortgage papers, military papers, safety deposit box, etc... Your Memorial Guide can be printed out, then folded in half into a nice looking 4-page “booklet”.*

## QUESTIONS ?

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