

Life Insurance Sales Essentials

All new **Campaign In a Box** module empowers you to engage clients in a love affair with Life! Packed with fundamentals of why and how to merchandise Life Insurance, the complete module offers prospecting, training and selling strategies promoting the fundamental value of life insurance to any audience.



Box O' Life



Spread the love

Show some love for your clients by helping protect them from unnecessary durations... Then show a little extra TLC by offering our NEW more affordable rates!

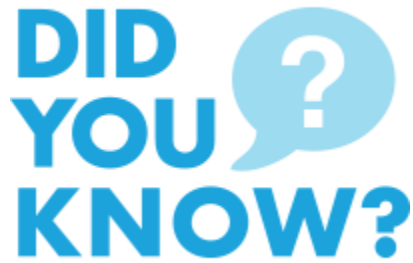
Lower Term Rates

Speed Dating Generation

Quickly show agents how to attract any generation client! Turn client meetings into speed dates with the new Generation Station client meeting prep tool.

Meeting Prep Tool





Did you know...

We've already laid out changes to the 2018 income and estate taxation side-by-side with 2017 for you. Check out our up-to-date Tax Tables today!

[Tax Tables](#)

What's up with...

NEW BUSINESS

Important Updates: Policy Dating and Draft Timing

We've updated our policy dating guidelines to allow for more uniform processes and provide more options for your clients to maximize the value of their policies. In turn, the policy effective date and your client's choices of draft dates or back dates may affect the timing and amount of premium drafts. We've created a summary of guidelines by product so you can better guide your client through their options.

[Bulletin 18-007](#).

IRS Form Update: 4506T-EZ

The IRS has revised its Request for Transcript of Tax Return form (4506T-EZ Rev 7-2017), which is required when the insured's age is 18 and older, and the policy face amount is \$5,000,001 and greater.

[Bulletin 18-014](#).

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