



Annuity

Did you know?
60 seconds to success

5 questions that could help uncover FIA opportunities

April is financial literacy month, making it a great time to help clients understand ways a fixed index annuity (FIA) could fit within

their overall portfolio.

We've uncovered five key questions you could ask to start that conversation ...

1. How long before you want to retire?
2. How much do you want to have safeguarded for your retirement?
3. How much of your retirement savings are you prepared to lose in a season of a market downturn? (Examples – 20%, 30%, 50%)
4. What do you need to earn back after losing a percentage of your savings? (Help explain to your clients the [break-even burden.](#))
5. Do you have time to earn back your retirement savings?

Consider asking these questions today! Contact me for more ways to help clients understand the importance of an FIA. In the meantime, share with the [balanced accumulation video](#), available on the client-approved [FIA protection website](#).

Thank you,

[signature]

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