

NewLife Insurance Marketing

Objectives, Goals and Plans to insure my future.

Name: _____ Date: _____

Statement of Objective: _____

Goals for the year: Earned Income \$ _____

Number of Sales _____

Annualized Life Premium \$ _____

Monthly Goals: Individual Life Sales A.P.=Annualized Premium

Mo Jan Feb Mar Apr May June July Aug Sept Oct Nov Dec

A.P. _____

Apps _____

Personal Goals that I will obtain by (date):

1. _____

2. _____

3. _____

4. _____

5. _____

I need help in these areas. Please check items.

☐ Prospecting

☐ Appointments

☐ Presentation

☐ Getting Referrals

☐ Closing the Sale

☐ Paperwork

☐ Policy Delivery

☐ Persistency

☐ Recruiting

☐ Product Knowledge

☐ Setting Goals

☐ Time Management

☐ Communications

☐ Financial Mgmt.

☐ Business Insurance

Comments: _____
