

# How to Add \$13M in Annuity Sales in **2026**

A Strategic Guide for Financial Growth

# THE PILLARS





SIMPLICITY  
MINNEAPOLIS

Top Secret success journey to  
\$30,000,000+ a year

# Pillar I

## Marathon VS. Sprint

This example is based on an advisor that has 250 clients.

- Adding 72 to 96 new clients per year ( 6 to 8 per month)
- Foolproof; no way this does not work
- Simply apply this to your practice, follow the steps and your future will be amazing.

# Pillar II

## Annual Reviews

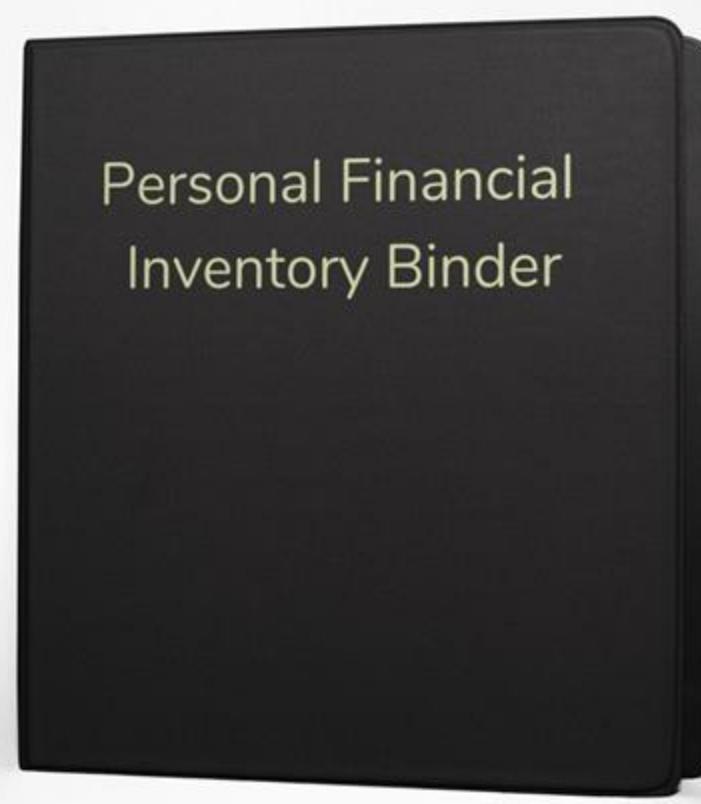
- Annual Reviews for 250 clients - only 200 will show.
- Of the 200 that show, you can bring in new money from 20%.
- 40 new additions of \$200,000 = \$8,000,000 in new money.
- 20 new additions of \$200,000= \$4,000,000 in new money.
- Easily done -Personal Financial Inventory Binder and Income Plan.

# Putting It All Together

Personal Financial Inventory is a game changer for your clients and prospects

It allows you to show how thorough the planning is around retirement

Everyone wants this, one central place that they can go to for all of their financial holdings



# Putting It All Together



- Income for Life Report
- Social Security Benefit Page
- Annuities / Life Insurance
- Other Accounts



# Pillar II

## Annual Reviews

- Annual Reviews for 250 clients - only 200 will show.
- Of the 200 that show you can bring over 200 referrals.
- Of the 200 referrals, lets just say only 60 are qualified (30%), this can and will improve once you define a Qualified Referral to your clients.
- Of the 60, you only meet with 60% = 36 meetings and you will close 75% of these = \$5,400,000 in new money to your firm.

# Pillar II

## Annual Reviews

- Of the 60, you only meet with 60% = 36 meetings and you will close 75% of these = \$5,400,000 in new money to your firm.
- This is using only a very small \$150,000 per ticket- our average for FMO is over \$205,000 and from referrals it is well in excess of \$250,000
- These are super conservative numbers

# Pillar III

## Future Sales

Future sales are small sales, you make now, that will lead to a large sales in the next year to five years. These are huge sales, and once you plant 50 to 100 seeds, they will sprout and bring a ton of new money to your practice.

- Identify 3 to 5 future sales a month and make them clients- this is easy.
- They will be blown away by you, because no one else is paying attention.
- Gain 36 of these each year for the next 2 years and the following will happen.

# Pillar III

## Future Sales

- Future sales are small sales, you make now, that will lead to a large sales in the next year to five years. These are huge sales, and once you plant 50 to 100 seeds, they will sprout and bring a ton of new money to your practice.
- Identify 3 to 5 future sales a month and make them clients- this is easy.
- They will be blown away by you, because no one else is paying attention.
- No one pays attention to these people because the real money is not available
- Show them the Income Planning and Personal Financial Inventory Binder

# Pillar III

## Future Sales

- You have gained 72 of these future sales and you are actively pursuing new future sales.
- After just two years, 20% of these will start to go active per year
  - $72 \times 20\% = 14.4.$
- Average ticket size will be at least \$300,000= \$ 4,320,000 in new money each and every year, just because you took the marathon approach vs. sprint.

*Let's pause and see where we are :*

Annual reviews = \$4,000,000

Referrals from annual reviews= \$5,400,000

Future Sales = \$4,320,000

Sub Total= \$13,720,000

We are at \$13,720,000, and we have identified only three of the ten pillars of strength- maybe we should stop here?

- Do you comprehend what you just saw?
- Does it make you pause?
- Would you like to see more?