



Practice Makes *Perfect*

SGOS Cheat Sheet

It was great to virtually see everyone at SGOS this year! We can all agree that it was not the same and we all missed being able to enjoy good friends, meals, and activities together. However, the virus will pass and soon we shall be able to enjoy fun times together again!

I wanted to put together a condensed cheat sheet, with all the documents covered and discussed during our training this year, so that you could access them all in one place. Hope you found the training to be productive and valuable to help you grow your business now and in the future.

15-min Call Outlines:

- [Corona-Economy Webinar Prospects](#)
- [Radio Prospects](#)
- [RMD Webinar Prospects](#)
- [SS Webinar Prospects](#)
- [EP Webinar Prospects](#)
- [RIS Prospect Outline](#)

Online Prospect Documents:

- [Social Security Checklist](#)
- [CFQ](#)
- [Rick's Advisor CFQ Summary](#)

15-min Call Confirmation Letters/Emails:

- [Corona-Economy Confirm Letter/Email](#)
- [RIS Call Confirmation Letter/Email](#)
- [RMD Webinar Confirm Letter/Email](#)

- [SS Webinar Confirm Letter/Email](#)
- [EP Webinar Confirm Letter/Email](#)

Statement Cheat Sheets:

- [Talking Prospects thru Statements](#)
- [Reading Statements Cheat Sheet](#)
- [Kaplan 2020 Tax Tables](#)

Closing Over the Phone:

- [Using the Drawing Tablet over the Phone](#)
- [Using Technology over the Phone](#)
- [GoTo Meeting Instructions](#)
- [Zoom Meeting Instructions](#)
- [Dave's Video Closing over the Phone](#)

Workshop Webinars:

- [Workshop Webinars Campaigns](#)
- [Client Referral Live Webinars](#)
- [Pat Peason Webinar Advice](#)
- [Zoom – Live Webinar Instructions](#)
- [GoTo Meeting – Live Webinar Instructions](#)

Digital Report/Package Campaigns:

- [Digital Report/Package Campaigns and Scripts](#)

Radio Show Cheat Sheets:

- [Radio Show CTA Cheat Sheet](#)
- [Radio Show Follow-Up Process](#)
- [Radio 15-min Call Outline](#)

RIS Radio/TV Leads:

- [RIS Lead Follow-Up Process](#)
- [RIS 15-min Call Outline](#)
- [RIS CopyTalk Outline](#)

SIS Documents:

- [DocuSign Instructions](#)
- [Compliance and Marketing](#)

If you have any questions, please [email](#) or call Naely Roman at (954) 870-6731.

