CHECKLIST

The Retirement Income Store®
WHERE RETIREES GO FOR INCOME

- **Within 24 hours of receiving the lead**

  - Call the prospect to confirm they received the "**Retirement Income Kit**", if applicable and confirm scheduled appointment
  - Mail the *Confirmation Letter* and *Shock & Awe Folder* or *Workshop Folder*

- **Day of the scheduled call**

  - Make the confirmation call either the day before or the day of the scheduled call.

- **Within 24 hours of 1st scheduled call**

  - Email RIS the following:
    - Copytalk from call
    - Did they keep the call?
    - Did they reschedule the call?

  - Update the metrics:
    - Kept Call?
    - Has Assets?
    - 2nd appt date?

- **If qualified, send copy of The Retirement Income Stor-E book**

- **Closing the RIS Lead**

  - Email RIS the following:
    - Copytalk from call
    - Total Assets Captured
    - AUM vs Aunnity