

Special Offer!

Preferred and Preferred Plus clients age 50 or under may automatically qualify for an EquiLiving® critical illness



CI SPECIAL OFFER

Sales tools help you open and close the sale

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If your clients are 50 or under, and qualify for a preferred risk class on a Term coverage, they will automatically be underwritten for EquiLiving CI. If they qualify, their term approval notice will be accompanied by an offer to purchase Critical Illness insurance in an amount equal to 25% of the face amount of their life insurance coverage PLUS the amount of the Term rider, to a maximum of \$250,000.

CLIENTS HAVE 45 DAYS TO ACCEPT THE OFFER!

Approved clients only have 45 days to complete, sign and return the Special Offer form to head office. They may need your help to understand what Critical Illness insurance can do for them and why it can be a critical part of their overall financial plan.

THESE TOOLS CAN HELP YOU SELL THE BENEFITS OF CRITICAL ILLNESS INSURANCE... AND MAKE MORE SALES!

[CI Special Offer Flyer \(français\)](#)

[Frequently Asked Questions](#)

[Meeting script to introduce the CI Special Offer to qualified clients \(français\)](#)

If your clients have been pre-approved for CI, you may need to help them see how this special offer will benefit them. At the term policy delivery meeting, you could introduce the Special Offer by saying something like this:

"As I mentioned on the phone, here is your term life insurance policy. Now you have the peace of mind knowing you've provided for your family's financial security should you not be around to take care of them.

Because of your healthy lifestyle, Equitable Life has also pre-approved you for critical illness insurance. The process for putting it in place is simple. No more questions, no further evidence."

Then use the meeting script to continue the discussion about critical illness insurance, handle objections and determine the right amount of insurance to meet their needs.

[Sample premiums flyer \(français\)](#)