

Opening the door – “What keeps you up at night?”

“What issues regarding finances keep you up at night?”

(You will get answers like outliving my money, losing money and volatility in the market.)

“How would it feel to help solve or eliminate those issues?” (Let them answer.)

“I recently read a great book that talked about how you could do exactly that...eliminate those very issues that keep you up at night. I’m going to give you (send you) a copy, but if I do will you be willing to read at least the first chapter? It’s only 6 pages long.”



Opening the door – CD Owners

“Did you know that if you own a CD, you are actually losing money each and every year?” (Let them answer.)

The reason I bring this up is because I just read an incredible book that talks about how that can be avoided. I thought you’d enjoy it as well, so I bought you a copy. But I have a favor to ask: Would you be willing to read Chapter 3 that talks about this, just 6 quick pages? (Let them answer.)

“Great. ‘Cause I’d love to get your thoughts.” Chapter 3 – Mr. Bankman

Opening the door – Future Taxation

“Did you know that up to 85% of your Social Security could be taxed as income once you begin receiving it?” (Let them answer.)

“You’re not alone. Most people don’t. The reason I bring this up is because I just read an incredible book that talks about how that can be avoided. I thought you’d enjoy it as well, so I bought you a copy. But I have a favor to ask: Would you be willing to read Chapter 4 that talks about this, just 6 quick pages?” (Let them answer.)

“Great. ‘Cause I’d love to get your thoughts.” Chapter 4 – It’s What You Keep That Counts

Opening the door – Power of Tax Deferral

“Have you ever seen just how powerful deferring tax can be for your future savings?” (Let them answer.)

“I thought I knew this as well, but I just read a great book that put it in a totally new perspective. I thought you’d enjoy it as well, so I bought you a copy. But I have a favor to ask: Would you be willing to read Chapter 5 that talks about this, just 4 quick pages?” (Let them answer.)

“Great. ‘Cause I’d love to get your thoughts.” Chapter 5 – The Magical Doubling Dollar

Opening the door – Average v. Actual Return

“Did you know that the “average” returns reported by stock market indexes are not usually the same thing as the actual returns they experienced?” (Let them answer.)

“You’re not alone. Most people don’t. The reason I bring this up is because I just read a great book that talks about this exact topic. I thought you’d enjoy it as well, so I bought you a copy. But I have a favor to ask: Would you be willing to read Chapter 6 that talks about this, just 5 quick pages?” (Let them answer.)

“Great. ‘Cause I’d love to get your thoughts.” Chapter 6 – The Big Lie

Opening the door – Building A Nest Egg

“What do you think is the most important thing for building a successful retirement nest egg?”

(If their answer is anything BUT “Never taking a loss then say:)

“I recently read a great book that shared that one of the most important things in doing that is never taking a loss. I think you’ll find that chapter pretty compelling. I’d like to give you a copy of that book, but I have a favor to ask: Would you be willing to read Chapter 7 that talks about this, just 10 quick pages?”

“Great. ‘Cause I’d love to get your thoughts.” Chapter 7 – Never Underestimate the Power of Zero

(If their answer IS “Never taking a loss then say:)

“I recently read a great book that would agree with you. I think you’ll find that chapter pretty compelling. I’d like to give you a copy of that book, but I have a favor to ask: Would you be willing to read Chapter 7 that talks about this, just 10 quick pages?”

“Great. ‘Cause I’d love to get your thoughts.” Chapter 7 – Never Underestimate the Power of Zero

Objection – “Annuities are expensive”

“One of the most common myths in the financial industry is that annuities are expensive. If someone buys the right one, it can actually be one of the lowest fee products they can purchase.

If I gave you a great book that explains the fee issue in a few short pages, would you be willing to read it?” (Let them answer.)

“Great. ‘Cause I’d love to get your thoughts.” Chapter 14 – What about the Fees?

Objection – “How is this possible?”

“Just so you know, that’s a very common question. But luckily it’s simple math and science. Not smoke and mirrors.

If I gave you a great book that explains the fee issue in a few short pages, would you be willing to read it? (Let them answer.)

“Great. ‘Cause I’d love to get your thoughts.” Chapter 10 – How Can They Do That?

Don’t forget another door opener is to just mail them a book priority mail and put a sticky note on the top that says,

“Someone recently recommended this book to me and said it helped them think of questions they never thought of asking before. It’s awesome. Enjoy!”

The gold is in the immediate follow up so don’t forget to give them a call after they’ve received the book.