Unlocking New Revenue

A Medicare Agent's Guide to Getting Started with Annuities

Medicare agents are in a unique position to expand their value—and revenue—by adding annuity solutions to their portfolio. Your clients trust you to guide them through healthcare decisions in retirement. **Why not also help them protect and grow their savings?**

This guide will show you **how to get started with annuities, leverage your existing client base**, and **position yourself as a full-service retirement resource.**

STEP 1: POSITION YOURSELF AS A RETIREMENT INCOME EXPERT

To successfully offer annuities, you must first expand your brand beyond Medicare:

Update Your Marketing to Reflect Your Broader Value:

- **Email Campaigns –** Use tools like Gordon Marketing's exclusive Compass CRM to send client education emails highlighting safe money options like **Fixed Indexed Annuities.**
- **Updated Business Cards –** Add "Retirement Planning" or "Income Protection" to your services list.
- **Lobby Signage & Digital Monitors –** Display the message: "Ask me how to protect your retirement income!"
- **Leave Behinds & Flyers –** Use pre-made marketing materials from Gordon Marketing to outline how you help beyond Medicare.
- **Postcards & Direct Mail –** Educate clients with digestible retirement insights.
- **Update Your Website –** Include an "Annuities & Retirement" section.
- **Monthly Newsletter –** Share annuity tips, client stories, or market updates.
- **Social Media Presence –** Use Facebook, Instagram, and LinkedIn to post retirement - focused content and client success stories.

STEP 2: START THE RIGHT CONVERSATIONS

Once you've planted the seed, it's time to dig deeper:

Use Tools to Identify Opportunities:

- **Fact Finder -** Uncover retirement goals, risk tolerance, and current savings habits with Gordon Marketing's Fact Finder.
- **Conversation Starters -** Use Gordon Marketing's white-labeled scripts and prompts to transition from Medicare to retirement income planning.

Set Up a Strategy Session:

- **Schedule an Annuity Value Proposition Meeting** with Gordon Marketing's Annuity Team to understand how annuities benefit your clients—and your business.

STEP 3: LEVERAGE THE EXPERTS

You don't have to do it alone.

Partner with the Gordon Marketing Annuity Team:

- **Case Design Support -** Bring client details, and the Gordon Marketing Annuity Team will help build the best solution.
- **Presentation Prep -** We'll walk through how to present the strategy in a way clients understand and trust.

STEP 4: GET LICENSED & READY TO SELL

- **Get Contracted -** Most annuity carriers use "Just-in-Time" (JIT) contracting - ask us how our expert contracting team can help you get started!
- **Complete the 4-Hour NAIC Best Interest Training -** A one-time requirement for annuity sales in most states.
- **Carrier/Product-Specific Training -** Learn the details that help you stand out and stay compliant.

STEP 5: SUBMIT BUSINESS WITH FAST, PAPERLESS APPLICATIONS

- **Use FireLight via Compass CRM** - Submit annuity business quickly and securely through your existing Compass CRM integration.

Your Success is our Mission

Contact the **Gordon Marketing Annuity Team** today to schedule your personalized onboarding session!

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