

## SALES IDEAS

Every sale begins with an idea. **IMAGISOFT's** Annuity Marketing System has dozens of ideas to help you get in front of prospective clients; for example, how to use annuities to reduce taxes.

### 1040 After Tax Planning

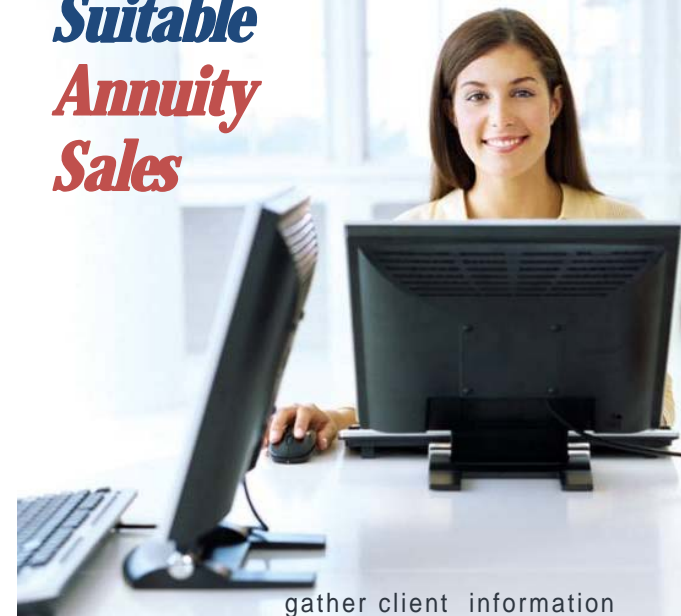
7 Wages, salaries, tips, etc.	0	0
8 a Taxable Interest	15,500	500
12 a Pensions and annuities	40,000	39,000
b Taxable Amount	40,000	26,000
14 a Social Security benefits	30,000	30,000
b Taxable Amount	25,500	4,750
15 <b>Total Income</b>	<b>81,000</b>	<b>31,250</b>
24 Standard Deduction	-12,800	-12,800
26 Exemptions	-6,800	-6,800
27 <b>Taxable Income</b>	<b>61,400</b>	<b>11,650</b>
28 <b>Tax</b>	<b>8,431</b>	<b>1,168</b>

**\$7,263 in Tax Savings**



Call us at  
**(877) 510-4702**  
to get your free  
**I Love Suitability**  
button!

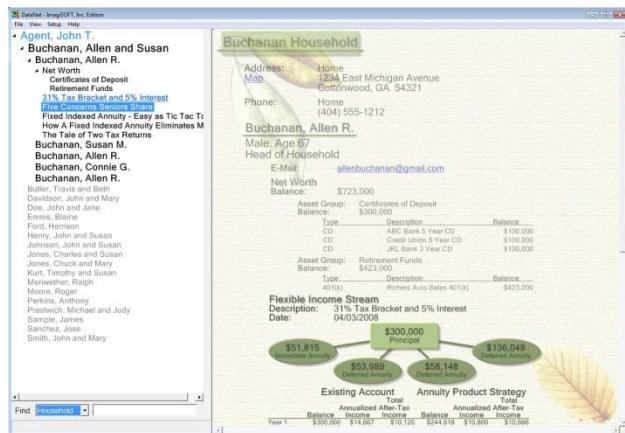
## Suitable Annuity Sales



gather client information  
sales ideas  
illustrate concepts  
recommend products  
in good order applications

## GATHER INFORMATION

Agents and their assistants only enter data once in **IMAGISOFT's** Annuity Marketing System. This data passes through to each successive step, from the presentation, concept, product illustration, and the completed "in good order" annuity application.



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Watch the video on our website!

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**Annuity  
Marketing &  
Suitability  
Software**

# Annuity Marketing & Suitability solution that will work for your business

DO YOU HAVE ONE USER OR THOUSANDS?

## ILLUSTRATE CONCEPTS

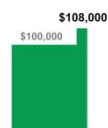
Once client, family and financial data is entered you can create **Roth IRA**, **Stretch IRA** or **Split Annuity** illustrations or presentations with minimal effort.

### How a Fixed Indexed Annuity Eliminates Market Risk

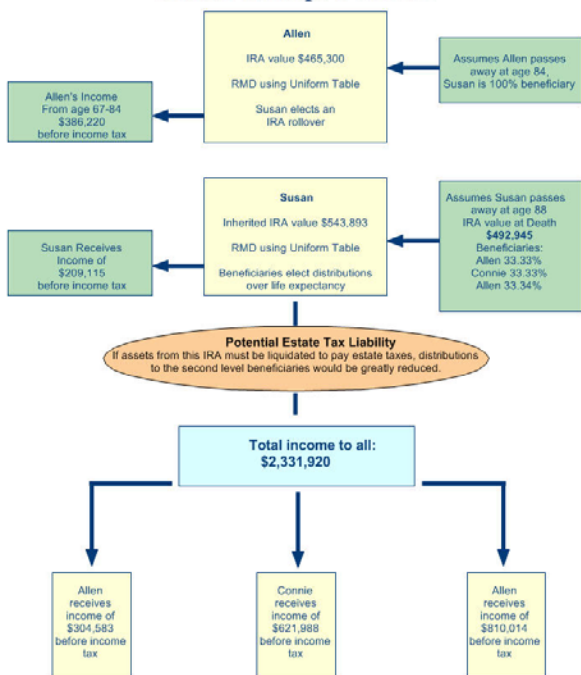


Prepared for  
**Allen R. Buchanan**  
by  
**John T. Agent**

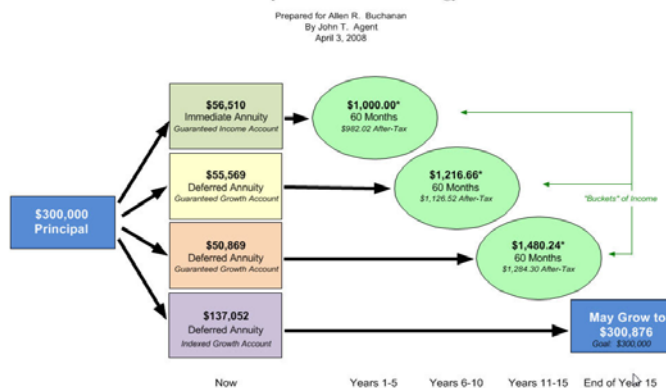
In our hypothetical example, this 15% gain in the index produced an interest rate of 8%.



### Stretch Concept Overview



### Annuity Product Income Strategy

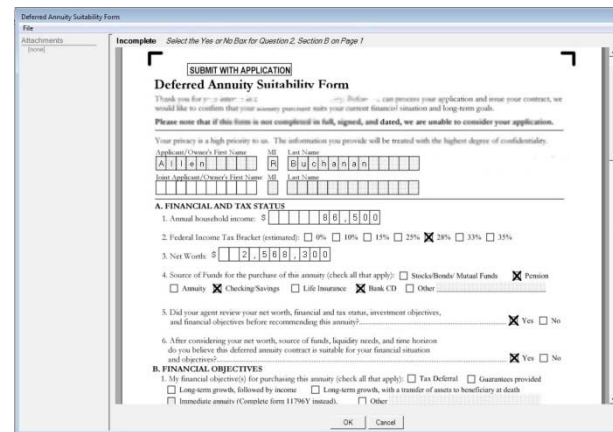


## RECOMMEND PRODUCTS

Insurance carriers who license **IMAGISOFT's** Annuity Illustration technology have their products plug-in effortlessly to the Annuity Marketing and Suitability System. Agents produce approved product illustrations instantly from the data generated from **Roth IRA**, **Stretch IRA** or **Split Annuity** concept illustrations.

## IN GOOD ORDER APPLICATIONS

Insurance carriers who license **IMAGISOFT's** Electronic Smart Forms will see a dramatic error reduction rate. Smart Forms automatically pre-fill fields with data previously entered in the client, financial, concept, and annuity illustrations. Each field is validated and each form must be complete and electronically signed before can be submitted.



**IMAGISOFT's** Annuity Marketing & Suitability System is the *only* software that shares data with every step in the annuity sales process inside a single interface. The data entered passes from the client fact finder to the concept presentation, to the product illustration, and through to the "in good order" application.



Install a 7-day free license

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