

1040 OVERLAY



uncover the life insurance sale with 1040 overlay

**Do you have great center of influence contacts with a terrific client base?
Are you looking for ways to work with these contacts?
Are you trying to find something new and interesting to bring to them?**

The strategy:

- 1040 Analysis tools that you can use with your CPA contacts to review client tax forms - line by line
- A coaching booklet that you can offer your CPA contacts and other centers of influence to help them understand planning they are not addressing with clients
- A case study to help show you how reviewing tax returns might reveal planning opportunities
- Approach letters that you can use with CPAs
- Pre-approach letters you can offer your CPA contacts so they can approach their best clients

See how 1040 Review can reveal opportunities for you and your CPA clients.

Please call me:



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