

PPGA 403(b) Marketing Plan

Personal Information

1. Name: _____ Agent # _____
2. Name of Agency : _____
3. Business Address: _____
City: _____ State: _____ Zip Code: _____
Business Phone: _____ Cell Phone: _____
Email: _____
4. Are you Securities Licensed? Yes No
5. Name of Employee/Sponsor and address: _____
6. What products are you going to offer:
 Annuity Life Mutual Funds Alternative Minimum Cafeteria 125 Plan
Other (please explain): _____
7. If you are marketing 403(b)/457, what school districts do you currently sell in?

8. Do you hold group meetings? Yes No
9. Do you have an existing relationship with the school? Yes No

Production commitment

10. Do you plan on writing LSW 403(b) flow business?
11. What are your production goals for LSW over the next:
3 months: _____
6 months: _____
12 months: _____
12. What is your overall LSW production goal for this group?
Annualized Flow Premium: _____
Life Target Premium: _____

Signature: _____
Date: _____

LSW...Integrity You Can Retire On!



Life Insurance Company of the Southwest