SALES IDEAS

Every sale begins with an idea. IMAGI**SOFT**'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.
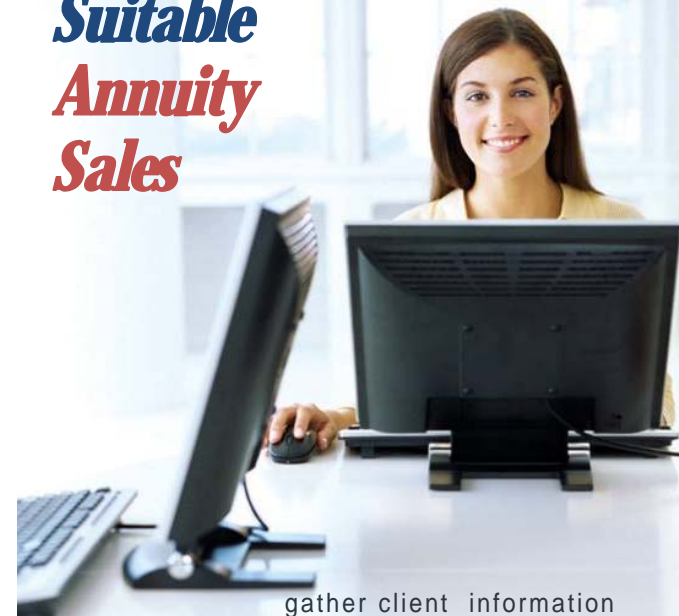

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I Love Suitability
button!

GATHER INFORMATION

Agents and their assistants only enter data once in IMAGI**SOFT**'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.

IMAGISOFT, Inc.
PO Box 13208
Albuquerque, NM 87192

Watch the video on our website!
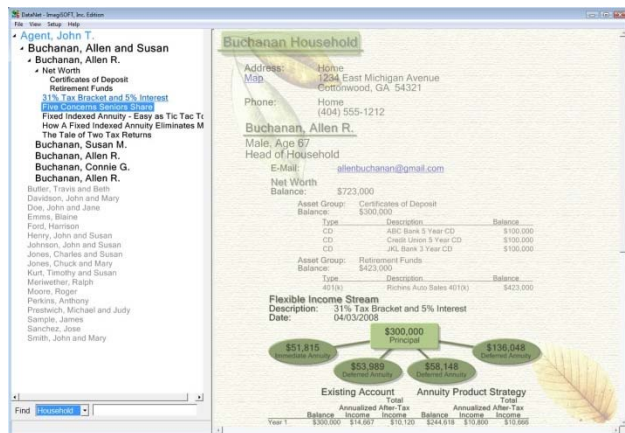
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www.imagisoft.com
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gather client information
sales ideas
illustrate concepts
recommend products
in good order applications

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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.

RECOMMEND PRODUCTS

Insurance carriers who license IMAGI**SOFT**'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 IMAGI**SOFT**'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.

Stretch Concept Overview

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%.

Annuity Product Income Strategy

Prepared for Allen R. Buchanan
By John T. Agent
April 3, 2008

IMAGI**SOFT**'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.

Powered By IMAGI**SOFT**

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