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AMFOC Success Story: "We now introduce this software to every new agent as their first useful prospecting tool."

"Three or four months ago we became aware of the Retirement Savings Planner software and the power of its presentation. To date more than two thirds of the agents and brokers in our agency have purchased the software and are using it. The software strongly answers a very important need: how to quickly gain the prospect's attention and establish credibility and trust. We are not aware of any other software that can provide that specific advantage the way the Retirement Savings Planner can.

It is a rare client or prospect today who does not have retirement concerns uppermost in his or her mind. Our agents have been thrilled to see how quickly they are able to bring a focus to the conversation with prospects and clients. This helps them make a direct and immediate connection with prospects' and clients' specific interests, and move toward a sale from early on in the opening meeting. That early sale is just as likely to be life insurance or long term care as a retirement product, because, as seen in the context of a successful retirement, removing the uncertainty of an unexpected death or long term care concern becomes a very high priority.

I have been surprised to see that the Retirement Savings Program seems to be effectively used in our agency both by agents who are quite analytical, and those who are less so. The program adapts well either way, providing a robust approach for those who really want the number crunching, but without giving up the software's strong advantages of being very visual, very immediate, and very simple in concept and execution. For those who are not analytical in nature, the software is a dream, allowing pictures and visuals to carry the day.

It's too early yet for us to have any definitive, comparative sales numbers, but we have been consistently hearing success stories from all quarters, and we've only had time to do limited training. We now highly recommend the software to every new Career Agent we hire and have found the new Career Agents to be very enthusiastic about it. They find it extremely easy to learn and use.

The last comment I would make is that the staff at Torrid Technologies have far exceeded our expectations in terms of support. They have been a pleasure to work with and have been very responsive to our agents. We look forward to a long relationship with Torrid Technologies!"

Ronald G. Gill, CSA*
General Agent



"...the most important software on my computer."

Since I have purchased the Retirement Planner I have come to regard it as the most important software on my computer. Each new person that I talk to, I ask if they would like to see a snapshot of their retirement picture. It only takes 15 or 20 minutes and once the basics are completed we can play "what if?" and get immediate feedback in graphic format.

It helps me to create credible relationships in a much shorter time frame and leads to potential sales in many areas like Life Insurance, Long Term Care and investments. I expect that it will also be a great tool for long term relationships as we meet at future times and review the results of our decisions by comparing the picture before and what it is at the future time.

Mark A. Umek*
Career Agent

"I like the Retirement Savings Planner software very much and use it frequently. Recently I sat down with a woman in a rush situation - I really only had a few minutes to spend with her. In 5 minutes we quickly inputted her information and showed a shortage and inadequate retirement funds, and I closed a Roth IRA right on the spot."

Martin O. McCann IV, LUTCF, CSA*
Career Agent

"The Retirement Savings Planner from Torrid Technologies has been the most exciting innovation we've come across in a long time. It has generated a lot of excitement and energy since we discovered it (thanks to you!) in May or June of this year. We just completed a very strong September of issued business and a good portion of that business was generated using the Retirement Savings Planner software.

We have developed and are using a flyer as a mailer and prospecting tool. We are in the process of developing a seminar and complete marketing program based on the software. We now introduce this software to every new agent as their first useful prospecting tool.

The success stories we have been hearing range from much easier life insurance and long term care insurance sales to all types of retirement planning sales.

I am thrilled that you will be able to be an exhibitor at NEC so that the entire field force of OneAmerica, including the Home Office and field force of the Retirement Services division, will have a chance to see the software up close and grasp its power."

David D. Braun, ChFC, CLU, CSA, LUTCF*
Associate General Agent

"I just took the time to explore the Torrid [RSP] software website and WOW! This IS exciting software because it is easy, fast and exciting to use with clients! Instead of completing fact finders, and then leaving client to go back to the office to spend time inputting everything, looks like I can do it all right when the prospect/client is at my office (or their home) for the first time. They can see it on screen, and I can print it out on my color inkjet printers (have a portable Canon color printer for my laptop when in the field). Thank you so much for turning us on to this sales resource. Take care."

William T. Robinson, LPRT*
Broker

I have been very impressed with how the objection of LTCi premium being too expensive never comes up when I show what happens to retirement funds when a long term care event is illustrated. I show the difference between cost of the event and the premium for LTCi. If the wife is present, I get the go ahead to present a LTCi quote.

Lance Nystrem, CSA*
Broker

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