

# Doing Business In Today's Marketplace

Great American conducted a survey to see how financial professionals are navigating challenges and finding successes during the COVID-19 pandemic. Here are the results!

## In what way(s) has social distancing impacted your ability to successfully conduct business?



## While working remotely, are there any business processes you've found to be cumbersome?

**72%**  
Say YES

**28%**  
Say NO



*"Electronic signatures for annuity transactions will be helpful to ease the troubles."*



In place of a wet signature, Great American is accepting electronic signatures on all new business paperwork signed through DocuSign or other approved vendors. Note for transfers/exchanges, you should confirm the current carrier will also allow electronic signatures.

*"Profiling clients and explaining how various options "work" is exceedingly difficult in a virtual setting, especially with older clients."*



Great American offers several consumer-approved videos and marketing materials to help aid your virtual meetings.

## What has been your most successful method of communication during the pandemic?



Responses in "Other" category included: Face-to-face meetings and In-home visits.

## What support do you need most right now?



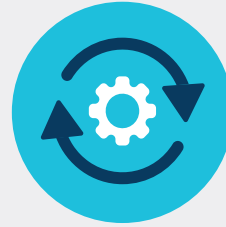
**40%**

Help with client outreach or engagement to prospect/retain clients



**22%**

Help with economic/market topics to assist with financial planning conversations



**18%**

Help with practice management topics to streamline remote business activities



**18%**

Other



*“Return of [Great American] rider options.”*

Many of Great American’s income riders are once again available for your fixed-indexed annuity sales!

## What is the best piece of advice you would provide to fellow advisors who are looking for ways to successfully navigate the pandemic?

“Just Listen to [your clients]. There are so many concerns and stressors. They just need to vent and feel listened to.”

“Since I haven’t been taking clients to lunch or dinner, I’ve been sending flowers to the female member of a family. Well received and memorable.”

“Prioritize calls to the clients that showed the highest degree of hesitation when you first met them. Call them, let them know what is going on in the market in a simple and understandable way. Then, if they are in a guaranteed account like an annuity or FIA, let them know that everything you just explained to them about the volatile market will have no impact on their specific account because of the guarantees. Remind them of what they have. Chances are they disclose assets that they didn’t discuss last time you spoke with them.”

“Keep actively working and proactively reaching out to clients. This will also lead to referrals which are more important than ever.”

“It’s important to stick to your routine as best you can while working remotely or abbreviated hours etc. I have found this helpful to stay on task as it can be challenging when working from home.”

“Revisit with prospects that you spoke to prior to the pandemic. Chances are their priorities and goals have changed.”

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No Bank or Credit Union Guarantee

May Lose Value

Not Insured by any Federal Government Agency

Not a Deposit