



## THE ROTH BLUEPRINT

# POINT OF SALE SUCCESS: FROM 'ON THE FENCE' TO 'ALL IN'

GREG WANTED  
TECHNOLOGY THAT  
COULD HELP HIM  
CLOSE DEALS AT  
POINT-OF-SALE.

HE GOT A TOOL THAT  
INSTANTLY SHOWS  
SKEPTICAL CLIENTS  
THE NUMBERS,  
DISSOLVES  
OBJECTIONS, AND  
TURNS HESITATION  
INTO ACTION.

### THE GREG LAWSON STORY

## USING THE ROTH BLUEPRINT TO CLOSE A \$2.8M ROTH CONVERSION CASE.

After the seminar, Greg didn't just ride the wave—he capitalized on it. Tom and Denise, a high-net-worth couple who attended his Roth Blueprint dinner, came in curious but skeptical. They were classic fence-sitters: concerned about RMDs, worried about IRMAA, but paralyzed by the thought of writing a six-figure check to the IRS.

Greg didn't push the sale...He demonstrated a strategy. Using the Roth Blueprint Software live at the table, he mapped a 7-year strategy that kept their IRA value intact, dodged IRMAA penalties, and chopped \$1.1M off their future tax bill—all without out-of-pocket costs or tax bracket jumps. When he clicked "Optimize" and the numbers lit up the screen, the fog lifted. "That makes sense," Tom said—and they were in.

**Three meetings later, \$2.8M was in a Roth-friendly annuity with a 20% bonus. No hard sell. Just clarity, confidence, and a killer tool that did the heavy lifting.**

### THE CLIENT PROFILE

#### TOM & DENISE

- ✓ Ages 66, 64
- ✓ Concerns: RMDs, IRMAA, inheritance taxes, tax hit from Roth conversion.
- ✓ Wants: tax-smart retirement strategy that protects liquidity, avoids penalties, and leaves a tax-free legacy

Names are fictional, based on an actual clients.

## 6 CHAIN REACTIONS TRIGGERED BY RMDs

One of the Roth Blueprint software's most powerful moves at the point of sale? It visually exposes the six chain reactions triggered by Required Minimum Distributions—hidden tax traps that quietly drain wealth. Most clients have never seen the full ripple effect laid out together:

1. Increased AGI
2. Taxation of Social Security
3. IRMAA surcharges
4. Loss of deductions
5. The widow's penalty
6. Taxable inheritance under the SECURE Act

The software connects the dots in real time—turning complex tax dynamics into a crystal-clear “aha” moment that drives action.



## THE POINT-OF-SALE SHIFT

The Roth Blueprint software transforms interest into action at point of sale.

It builds on the ACTE framework introduced at the seminar, guiding clients from curiosity to commitment with a clear, visual narrative.

By showing real numbers, revealing the costly chain reactions of RMDs, and offering Roth-friendly annuity strategies that eliminate out-of-pocket taxes, the software makes the decision feel not just smart—but *inevitable*.

### BY THE NUMBERS

- ✓ Time to close: 3 meetings
- ✓ Total Premium: \$2.8M
- ✓ Product Used: Roth-friendly FIA with 20% bonus
- ✓ Tax Source: Internal
- ✓ Client Benefits:
  - No out-of-pocket taxes
  - No RMDs
  - \$3.6M Roth projected at age 95

TO GET MORE INFORMATION ON THE ROTH BLUEPRINT OR SEE IF YOU QUALIFY, CONTACT YOUR DMI VICE PRESIDENT OF SALES. OR CALL **781.919.2337 TO SPEAK WITH DECLAN DONAHUE.**

