

### Affiliate Program III: **Business Succession Strategies (BSS)**

The CORNERSTONE Financial Services' **Business Succession Strategies** Program was developed by Irving Katz<sup>1</sup> renowned Insurance Professional and Author of "Family Business Secrets", what every successful business owner knows.

The BSS System and the Irving Katz Book gives you the advisor, a successful road map for working with business owners to establish yourself as their "Family Business Coach® (FBC)". It provides the training tools you will need to, get in the doors, break down the barriers, and close the transaction.

"Family Business Secrets" will teach you how to begin to have conversations with business owners that they want to have. It puts advisors on the same side of the table as business owners. Business owners do not want to have the "I" or insurance conversation. They do want to talk about cash flow, creating more profits and building businesses that they can transfer to their children or sell for a lot of cash.

As these conversations progress the business owner then wants to know about protecting themselves from the risks of dying too soon, living to long and outliving their money and becoming sick or disabled along the way. The Tax conversation also comes up.

Once the advisor becomes the trusted "Family Business Coach® (FBC)" of the business owner, then business owner wants to know how to protect himself from the risks and reduce taxes. The advisor is there to get the business and the referrals. Why, because the advisor has done what no other insurance salesmen have done.

This all adds up to an unfair advantage for the Business Succession Advisor, who makes his clients happy and is referable.

This is a step by step program that includes:

- The Conversations and Scripts necessary to initiate, create interest and close the sale.
- The Marketing Material to "Start the Conversation" and "Getting the Appointment" that insures a successful process
- Webinars and/or Classroom Training
- Field Training and/or Partnership (commission share) with Professional "Family Business Coach® (FBC)" where available.

### **For More Information**

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<sup>1</sup>Irving Katz is president and founder of Katz Financial LLC, a California based company providing consultative services and conservative, tax-efficient financial products. As a registered investment advisor and financial strategist for over 40 years, Irving has provided high net worth individuals and businesses with effective guidance and flexible plans for growing and protecting their assets. He is also an accomplished insurance industry leader who served as General Manager at Prudential Insurance and CNA and as #1 Regional Manager at Metropolitan Life in New Jersey. A consistent producer, Irving Katz has qualified and attended the Million Dollar Roundtable Conference for the last ten years where he volunteers and learns from the best. Irving Katz earned his MBA in Finance & Marketing from the Kelly School of Business at Indiana University and his MSFS from the American College in Bryn Mawr, Pennsylvania. He maintains current designations as a Registered Investment Advisor, Chartered Life Underwriter, Life Analyst and a Chartered Financial Consultant.