



## 2016 MDRT Annual Meeting e-Handout Material

**Title:** Presented in Japanese Language: Target Marketing and the Moment

**Speaker:** Yasuhisa Ueki, CFP, TLC

**Presentation Date:** Tuesday, June 14, 2016

**Presentation Time:** 10:00 - 11:00 a.m.

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Slide 1



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Slide 2



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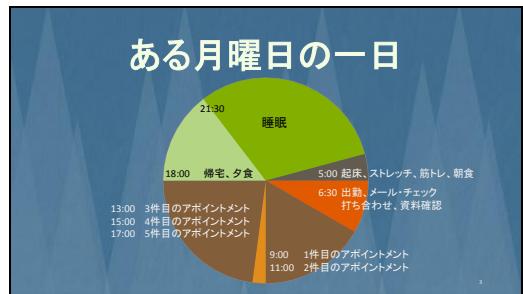
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Slide 3



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Slide 4



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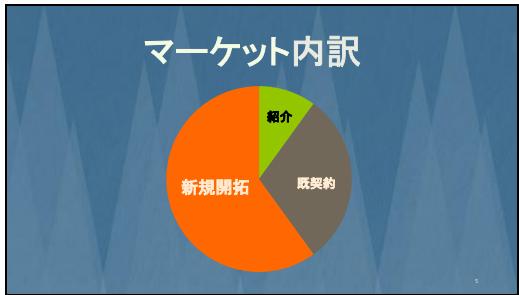
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Slide 5



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Slide 6

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- A slide titled "仕事の形態" (Work形态) listing four points about career progression:
1. 入社当初は個人保険のみ
  2. 4年目からの3W50週
  3. 法人保険に移行する2つのきっかけ
  4. 営業エリア

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Slide 7

**TOT会員の圧倒的な違い**

1. 決意 **vs.** 覚悟
2. 時間軸のイメージ



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Slide 8

**10年前**

1. 社歴の浅い法人
2. 税理士開拓



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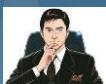
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Slide 9

**理想的な法人及び経営者**

1. 決断の早い経営者
2. 嫌いなクライアント



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経営者

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Slide 10

## 法人保険について

1. しっかり勉強
2. キヤツシユフロー
3. 「言った」と「伝わった」の違い
4. 保険契約の分割

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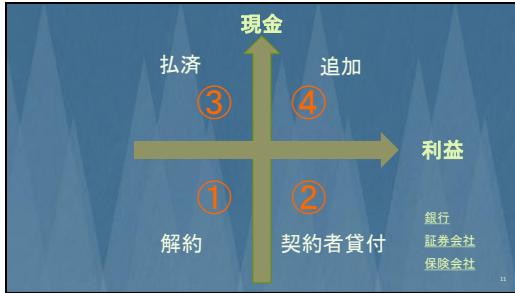
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Slide 11



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Slide 12

## 推奨書物

- ・『オーナー社長のための税金ゼロの事業承継』  
GTAC / (株) 幻冬舎メディアコンサルティング
- ・『未上場企業オーナーのための  
自社株承継マニュアル』  
税理士法人 和/ (株) すばる舎リンクージ

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Slide 13

いまいち飛躍できない方

相手の立場で  
本当に考えているか？

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Slide 14

10年後の展望



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Slide 15

いかに多くの経験を積み  
イメージを持ち  
決意できるか

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