



America's #1 Sales Planners . . . made in America and built on American ideals!

The Planners that give you the...Freedom to Succeed™

Over 1.5 million Sold . . . across this noble profession and industry!

Which SAMBook® Planner (aka, SAM Planner) is best for me?		
PLANNER NAME (standard versions)	Item #	Descriptions
2023 S.A.M. for Insurance & Financial Services™	103FS23	This was one of our inaugural sales planners, originally created (in 1996) to help Client Builder/OCS users succeed. It is still widely used across many companies and remains among our most popular!
2023 PRACTICE MANAGER™ for Agents & Advisors	107PM23	This unique planner is also one of our most popular and was created for Agents/Advisors who may want to manage and measure financial planning and fees in their practice.
2023 Sales Activity Manager™ for Multi-line Agents	105ML23	This sales planner was created by and for Property Casualty agents/producers who may also want to measure life insurance sales effectiveness.
2023 Practice Development Planner™ (for EXP Producers)	106PDP23	This planner is for experienced Agents & Advisors focused on results and has our most comprehensive sections for business planning, referrals, client progress and production.
555 LEADERSHIP PLANNER™ for Recruiting (2023)	101LP23	This is our only planner for industry Leaders to measure and monitor recruiting effectiveness, plus the ability to manage training activity and personal production.
2023 AMERIPRISE Business Activity Manager™	201AP23	The Ameriprise Business Activity Manager™ was one of our first planners created (circa 1996) and customized around their unique culture and products offered.
2023 Sales Activity Manager™ for All Sales Professionals	104GE23	This is the original "Sales Activity Manager" planner created to empower the general sales profession to manage their high-payoff sales activities to drive results. It's the first-of-its kind planner...for a Noble Profession!
2023 SAM70® Sales Planner (30% smaller; 7.25" x 9.5")	102S7023	This unique SAMBook is about 70% the size of our other planners, hence the name, but still has the same business-building components for sales professionals in any industry.
2023 REAL ESTATE Business Activity Manager™	109RE23	The only sales planner designed by and for Real Estate Agents to help them set goals and keep score of their high-payoff sales and client activities to grow and manage their business.
Custom SAMBook® Planners		Call to discuss details and pricing! Clients have included New York Life, Prudential, OneAmerica, Guardian, Mutual of Omaha, Primerica AXA/Equitable, and more!

TRIVIA: The SAMBook™ nickname was originally coined by early clients with AMEX and NML).



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SAMBook® | SAM Suite | SAM Service

Empowering business tools helping Clients THRIVE...since 1995™

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