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NAIFA



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

The Planners with a Purpose: The Freedom to Succeed™

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

Which SAM Planner™ (aka, SAMBook) is best for you?		
PLANNER NAME (standard versions)	Item #	Descriptions
S.A.M. for Insurance & Financial Services™	103FS25	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!
PRACTICE MANAGER™ for Agents & Advisors	107PM25	This unique planner is also one of our most popular (esp. NYL) and was created for Agents/Advisors to manage and measure sales activity plus financial planning and fees in their practice.
Sales Activity Manager™ for Multi-line Agents	105ML25	This sales planner was created by and for Property Casualty agents/producers who may also want to measure life insurance sales effectiveness.
Practice Development Planner™ (for EXP Producers)	106PDP25	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	101LP25	This is our only planner for industry Leaders to measure and monitor recruiting effectiveness, plus the ability to manage training activity and personal production.
AMERIPRISE Business Activity Manager™	201AP25	The Ameriprise Business Activity Manager™ was one of our first planners created (circa 1996) and customized around their unique culture and products offered.
Sales Activity Manager™ for All Sales Professionals	104GE24	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 was the first-of-its-kind planner...created for this Noble Profession!
SAM70® Sales Planner (30% smaller; 7.25" x 9.5")	102S7025	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.
REAL ESTATE Business Activity Manager™	109RE25	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 SAMPlanner® Sales Planners	<p>Call to discuss details and pricing! Clients have included New York Life, Prudential, OneAmerica, Guardian, Mutual of Omaha, Primerica AXA/Equitable, and more!</p>	

TRIVIA: The SAMPlanner & SAMBook™ nicknames were coined by early clients with Ameriprise and Northwestern Mutual).



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Home of **SAM Planners®** | **SAM Suite** | **SAM Services**

A patriotic, faith-based company . . . Inspiring Confidence and Success since 1995™

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