

Business Insurance eKit

Consumer Pieces

Consumer Brochure	This customizable brochure provides a breakdown of the different types of business insurance options available to business owners who aren't quite sure what they're needing. Target: all advisors
Talking Points	Getting the conversation started can be one of the hardest things advisors face. This customizable piece provides the advisor with some simple questions they can ask to help identify and explore potential opportunities. Target: all advisors

Producer Pieces

Advisor Presentation	Business Insurance 101: This customizable presentation provides data, identifies business insurance opportunities and outlines individual concepts in an easy to understand manner. This presentation can be presented as one piece or broken into specific individual presentations for a rifled approach. Target: all advisors.
Strategy Guide	Position your organization and your advisors as business insurance specialists with this customizable guide. This piece will help advisors target clients, and identify which business insurance strategy may be appropriate. Target: All advisors

Tools

White Paper/ 101 (j) kit	Looking to differentiate yourself in the business market? This customizable advanced concept piece can be presented as a white paper or advisor guide and was designed to give your agency one more resource to offer to your advisor , by taking a complex concept and explaining the terms to clients who have existing employer owned life insurance. Target: All advisors
Navigator	In the last five years, maximum benefits and contribution limits have changed. This customizable navigator breaks those changes down into an at-a-glance and easy to read resource. Target: all advisors
Buy-Sell Strategies	Customize this one-page overview for your advisors and give them a quick understanding of the many different buy-sell agreements they can explain to their clients in "Laymen's Terms". Target: all advisors