

Life Insurance Policy Review eKit

Consumer Pieces

Consumer Brochure	This customizable brochure is great for non-traditional life insurance producers to highlight policy review as an added service with their clients. Target: Producers with a retail location such as P&C agents.
Prospect Letter	Having a customizable letter that advisors can send promoting policy review can be a great way to equip non-traditional advisors with a simple non-intrusive way to begin prospecting for life insurance. Target: Advisors with a sizable client base looking to engage in new opportunities.
Life Insurance Policy Review	A customizable and comprehensive life insurance policy review kit that is designed to equip advisors with a step by step guide complete with a scorecard comparison. This kit and the carrier illustrations are all the advisor needs to perform a complete review. Target: Non-Traditional advisors that need a roadmap when meeting with their clients to perform a policy review.
Life Insurance Policy Review Summary	This condensed kit only includes the key data and recommendations. Still fully customizable , this kit was designed for the traditional advisor in mind that is accustomed to working with their clients on policy reviews but still includes the scorecard to compare policies. Target: Traditional advisors.

Producer Pieces

Advisor Guide	Show your advisors why life insurance policy reviews are something that should be a main focus in their practice. This customizable kit provides data and research discussing the opportunity and need for policy reviews. Target: all advisors.
Talking Points	Give those non-traditional advisors the conversation starters they need to identify policy review opportunities with this simple talking points. Customize this piece to your agency and provide added value and revenue generating ideas to your advisors. Target: Advisors that need assistance incorporating policy review into their client meetings.
Advanced Marketing Ideas	Show the value and knowledge your agency brings to your advisors with this customizable advanced markets one-pager. Highlighting the importance of life insurance policy reviews at a more advanced level is a great way to showcase your organization as an expert in the policy review market. Target: All advisors

Tools

White Paper	This customizable white paper is designed to be authored by someone in your agency and distributed to your advisors or blogged on your website. This piece discusses the new opportunities that exist with policy review following the downturn of guaranteed universal life and highlights living benefit riders as the new differentiators when looking to replace current inforce policies.
Playbook	Looking for opportunities after the sale? This brief playbook discusses ways to engage your case management department in helping identify additional sales opportunities after underwriting is complete. This is a great way to bring added value to your advisors and engage your ops team in uncovering additional opportunities.
Additional LIPR Opportunity	A simple one page customizable cover letter that can be added to the top of a newly issued policy to show the advisor that additional opportunity exists. Use this piece and an inforce authorization as a way to generate additional sales for those clients that have other insurance inforce that may need to be reviewed.