

# LIFE LONG INSURANCE SERVICE

HIGH TOUCH, HIGH TECH.



## AIM: APPLICATION INFORMATION MESSAGE



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**Where are clients in the process?  
We let clients (and advisors) know every step of the way:**

- Interview
- Application
- Exam & Labs
- Underwriting
- Policy Issue & Delivery

## APE: ADVANCE PREMIUM E-MAIL



**Is a premium coming due?  
We'll remind clients (and advisors) with our friendly APE:**

- A helpful reminder (Important for your busy lives)
- A good back-up plan (Clients will also receive a notice from the insurance company via postal service)
- It's an easy update tool (Clients move; lifestyles change. Maybe it's time for a client-advisor plan review.)

## NOTE: NOTIFICATION OF TERM EXPIRATION



**We follow up with clients 10, 20, even 30 years after purchasing a policy with an alert that the guaranteed term period is ending and options that save money or match their current needs, regardless of current health:**

- Convert to permanent policy
- Applying for new coverage



The advisor's insurance advisor.®

## YOUR ONE-STOP INSURANCE RESOURCE FOR

Term Life | Permanent Individual & Survivorship Life | Annuities | Disability | Critical Care  
LTCi | Hybrid Life/LTCi | Hybrid Annuity/LTCi | Policy Reviews | Life Settlements

(we recommend low-load permanent life insurance and annuities when possible)

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