SALES SUPPORT AND OPERATIONS

PLAN brings the latest approved sales ideas, concepts, and point-of-sale assistance to financial advisors. We have in-house underwriters to assess and negotiate the most favorable underwriting offers, especially for impaired risk cases. We utilize the latest technology to efficiently process business and place cases as quickly and seamlessly as possible.

INTERNAL SPECIALISTS

Sales Support

- Sales concepts
- Illustrations
- Access to carrier solutions and internal staff
- Case management
- Quick turnaround

Underwriting Review

- In-house expertise
- Highly impaired clients
- Carrier niches
- Celebrities and high profile clients

Case Design and Advanced Sales

- Protection
- Estate planning
- Retirement planning
- Legacy building
- Business owners

Compliance and Legal Expertise

- TLS encryption email communication
- Privacy and security of client information
- Fully compliant solutions
- Advanced sales attorneys on staff
- Understand suitability requirements

CARRIER RELATIONSHIPS

PLAN has access to the top carrier contracts and products approved by our client firms to provide Financial Advisors with a competitive advantage in the marketplace.

PLAN
PROFESSIONAL LIFE ADVISORS NETWORK
info@planlifeadvisors.org
www.planlifeadvisors.org

PLAN
PROFESSIONAL LIFE ADVISORS NETWORK

Dedicated to assisting Financial Advisors develop and grow the life insurance planning portion of their practice

PROFESSIONAL LIFE ADVISORS NETWORK

Professional Life Advisors Network (PLAN) is a national organization focused on the sale of life, long term care, disability, and linked benefit products through alternative distribution channels such as wirehouses, broker-dealers, registered investment advisors, property casualty agencies, banks, and other financial institutions. PLAN specializes exclusively in assisting Financial Advisors grow client relationships by enhancing client portfolios to include insurance product solutions.

PLAN's national sales organization is comprised of over 150 experienced point-of-sale professionals who are top of class and highly talented, as evidenced by their years of experience, advanced designations, and impressive sales results.

PLAN offers a turnkey opportunity for Financial Advisors to enhance their client relationships through broader services and product offerings

ABOUT US

- Nationally managed sales organization with local support
- Consistent national sales approach using compliant insurance products and concepts
- Experienced, highly trained field point-of-sale professionals
- Proprietary training program focused on sales in financial institutions marketplace
- Superior insurance processing to ensure the optimal outcome
- Exceptional carrier relationships

PLAN POINT-OF-SALE PROFESSIONALS

Nationwide Coverage

- Over 150 point-of-sale professionals nationwide
- Coverage in every metropolitan area
- Footprint reaches across all 50 states

Best of Class Talent

- 20-plus years average experience in the insurance industry
- Advanced designations
- Proven track record of working in and understanding the financial institution marketplace

PARTNERSHIP

Financial Advisor and Point-of-Sale Relationship

STEP 1: PARTNER

Understand and preserve the Financial Advisor and client relationship

Identify broader services and product offerings through insurance to expand business

One-on-one support every step of the way

STEP 2: BOOK OF BUSINESS REVIEW

Discuss the demographic of Financial Advisor's business

Focus on opportunities for sales concepts and insurance solutions

Death Benefit Protection	Disability Coverage
Linked Benefit Products	Business Solutions
Wealth Accumulation	Long Term Care
Annuity Maximization	Wealth Transfer

STEP 3: PROSPECT AND DATA MINE

Navigate firm systems to identify prospective clients

STEP 4: PRESENTATION TO CLIENTS

Presentation on products or financial analysis

Offer solutions to serve the best interest of the client

Position the Financial Advisor as the wealth manager

Expertise to close the sale