



ADVANCED INSURANCE BROKERAGE · TOTAL SOURCE PARTNERSHIP PROGRAM

Building your life insurance practice

A five-step process that adds life insurance and financial services to the firm you already run. It brings value to your clients and to the CPAs, P&C agents and financial professionals who serve them. It starts with the firm assessment that follows this page.

01

Firm assessment

A fact finder on your firm's capabilities, growth goals and the best way to position a new offering.

02

Client segmentation

Tools to review your client base and find where added services bring the most value.

03

Marketing plan

A plan built from the assessment and tailored to your key client segments.

04

Turnkey implementation

A detailed schedule that turns the plan into action steps for each target segment.

05

Ongoing support

Guidance, coaching and shared best practices as your financial services practice grows.

1 FIRM ASSESSMENT

Firm demographics

FIRM NAME

CONTACT PERSON

ADDRESS

EMAIL

ADDRESS (LINE 2)

SENIOR PARTNER

CITY

YEAR OPENED

STATE

NUMBER OF PARTNERS

ZIP

PARTNERS' AVERAGE TENURE

PHONE

PARTNERS' AVERAGE AGE

FAX

NUMBER OF PRODUCERS

TOTAL PREMIUM, LAST 3 YEARS

NUMBER OF CSRS

NUMBER OF COMMERCIAL CLIENTS

NUMBER OF PERSONAL CLIENTS

2 FIRM ASSESSMENT

Core disciplines

For property/casualty partner firms only. Other partner firms may skip this section.

Commercial lines: primary carriers

1. 2. 3.

Personal lines: primary carriers

1. 2. 3.

3 FIRM ASSESSMENT

Client demographics

Estimate the share of your client base in each group. Each group should add up to about 100%.

Ages	% of clients
20–40	_____ %
41–60	_____ %
61 and above	_____ %

Household income	% of clients
\$100,000 and below	_____ %
\$100,000–\$250,000	_____ %
\$250,000 and above	_____ %

Net worth	% of clients
\$0–\$500,000	_____ %
\$500,000–\$1 million	_____ %
\$1 million and above	_____ %

Occupations	% of clients
Professionals	_____ %
Business owners / self-employed	_____ %
Executives / managers	_____ %
Non-profit / public employees	_____ %
Trades / industry	_____ %
Retirees	_____ %
Other	_____ %

Rank your clients' needs	1 to 6
Financial planning	_____
Risk management	_____
Estate planning	_____
Investment strategies	_____
Retirement planning	_____
Business planning	_____

1 = least important, 6 = most important.

General comments

4 FIRM ASSESSMENT

Financial services objectives

How many people would be dedicated to the financial services division?

NUMBER OF PARTNERS

NUMBER OF STAFF

If you add financial services, how much revenue do you expect to produce in the first 12 months?

What happens next. We review your assessment with you, then move to step 2: segmenting your client base and choosing the partnership level, Brokerage or Total Source, that fits your firm.

COMPLETED BY

DATE

Information in this assessment is used only to evaluate and design a partnership with your firm and is kept confidential. For financial professional use only.



Advanced Group

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