Advanced Insurance Brokerage

ADVANCED INSURANCE BROKERAGE · TOTAL SOURCE PARTNERSHIP PROGRAM

A life insurance department for your P&C agency

Your agency already has the relationships: a large base of personal and commercial lines clients, and prospects who fit your book. AIB brings dozens of top-rated life insurance carriers, a dedicated life agent and the marketing to put them to work for those clients.

01

Life insurance solutions

Carrier access, case design, underwriting and placement, for sales and service.

02

Agent development

A dedicated life agent, weekly coaching and advanced planning training.

03

CRM and outbound marketing

Leads loaded into a supported CRM, worked by your agency and ours.

04

Software and systems

Quoting, illustration, research and training tools, supported by AIB.

THE OPPORTUNITY

01 Life insurance that complements your book

The typical property and casualty agency already serves a large base of business and personal lines clients. The marketing plan reaches those clients first, then non-agency prospects who are a good fit for the agency. AIB's carriers complement the coverage you already provide.

Life insurance solutions

Sales and service

- **Top-rated carrier access,** compensation, application processing, case underwriting and placement
- **Carrier and product guidance** with marketing strategies by product type
- **Retail campaigns** focused on your personal lines clients
- **Commercial campaigns** focused on your commercial lines clients
- **Beyond life insurance:** disability income (personal and business), long-term care, fixed and indexed annuities, income annuities and single premium life

Agent development

Building the life side of your agency

- **Targeted marketing and sales activity,** internal and external
- **Coordinated marketing** between the AIB, AG and ACI marketing department and your agency
- **Weekly agent coaching,** training and review
- **Advanced planning concepts** and training
- **Point-of-sale help** from AIB, or a dedicated agent working your agency's clients through presentations and closings

Behind your agency's name. Your clients stay your clients. AIB works as the life insurance department your agency does not have to build or staff on its own.

Additional Total Source services

Advanced Group Affiliated Partner. Total Source agencies can choose the Affiliated Partner option when marketing to new and existing personal and commercial lines clients and prospects.

Database management

- Commercial prospect database*
- Life insurance opportunity profiling of the agency's personal and commercial lines clients
- Profiling results applied to case studies and concepts
- Agency website coordinated with case studies, concepts and marketing*

*Supplied by AIB to Affiliated Partners.

CRM AND OUTBOUND MARKETING

02 How the leads flow

AIB provides and supports the CRM and database software, used for internal or external marketing. Business leads are loaded into the CRM, and the campaign runs in four steps.

1

AIB loads the leads

Business leads are provided and loaded into the agency's CRM.

2

The agency scrubs

Your agency removes existing clients before any outbound campaign begins.

3

The agency works P&C

Your team works the warm prospects for property and casualty opportunities.

4

Life flips to the life agent

Life insurance opportunities pass to the dedicated life agent.

The CRM tracks activity against daily, weekly or monthly goals.

Software and systems AIB supports

System	Used for	Cost
AIB Site	Quoting, content and training	
AIB Tools	Case design and product research	
WinFlex	Life insurance quoting	
Leap Systems	Client PSG modeling and client engagement	Recommended, not required. $165 a month; AIB partners receive a 20% discount ($132).
InsMark	Concept training and illustrations	
VitalSigns	Carrier ratings, research and financials	
MDRT Academy	Agency training and education in life insurance	Optional. $275 a year.

MDRT Academy

For advisors working toward MDRT-level production: personalized, digital-first training and access to leaders who share their knowledge.

MDRT

For advisors who have reached high production levels: a networking community and events where leaders push each other to excel.

AIB supports partner agencies as an MDRT Center of Field Leadership member and as an MDRT agent member and mentor.

PARTNERSHIP OPTIONS

03 Two ways to work with AIB

SELF-SERVICE

Brokerage

No monthly fee and no dedicated sales agent. Carrier access and case support, with limited technology and software support. No dedicated marketing or agency life insurance campaigns, and no lead generation.

FULL PARTNERSHIP

Total Source

A dedicated life agent, agent sales management and marketing support, plus business leads that are exclusive to your agency.

	Brokerage	Total Source
Monthly program fee	None	**Per partnership agreement**
Dedicated life agent	No; agency self-service	**Yes**
Agent sales management and coaching	No	**Weekly coaching, training and review**
Technology and software support	Limited	**Full: CRM, database and the software below**
Agency life insurance campaigns	No	**Retail and commercial campaigns**
Business leads	No	**Yes, exclusive to the partner agency**
Carrier access, processing, underwriting, placement	Yes	**Yes**
Advanced Group Affiliated Partner option	No	**Available**

Next step: the firm assessment. A one-hour fact finder on your agency's clients, carriers and goals. We review it with you and set the partnership level, Brokerage or Total Source, that fits your firm.

Advanced Group

CONTACT

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