Webinar – The Life Insurance Policy Review Program

One of the most important things that you can do for your clients is to make sure that they have enough life insurance protection and that the policies they have are capable and adequate to do the job they were intended to do. Things have a way of changing over time; marriage, children, aging parents, new jobs, salary adjustments, goals, and for some divorce. Each of these events can have an impact on the type and amount of life insurance needed to protect one's family and wealth. At the very least, a beneficiary check should be made to make sure that the named beneficiaries are accurate and current.

The Life Insurance Policy Review Program is designed to provide you with a turnkey process to keep your client's policies up to date.

The Benefits Include…

1. **A Client Service Model** that will keep you in front of clients on a regular basis and help you do a better job of cross selling them.
2. **Forms**. Included in the Program are all the letters, forms and scripts you need to add a formal policy review process to your practice.
3. **Referrability.** Your clients will appreciate the value of your service and be more willing to introduce you to other quality people.
4. **Improved Client Retention.** By delivering on the promises you made to your clients, you will create loyalty and expand the value of your practice.
5. **Effectively Outsource Parts of the Policy Review Process to Appletree Financial.** Learn how Appletree can help you expand your business, save you time, and increase your revenue.

Join us for a Webinar

- ✓ **June 29 at 11 AM or**
- ✓ **July 1st at 2 PM**

Think About it…

How many policies have you sold that have not been serviced in the last five years or longer?

How many 20-year term policies did you sell 10 years ago that could use a fresh look?

Perhaps some of your policies should be rewritten or converted to a permanent form of life insurance.

Are some of your clients susceptible to policy replacement by other agents or advisors because of your lack of service?

Do you think there are people out there who are not your clients, who are underserved and who could use your policy review service?

Could your practice be more valuable if you had more systems and processes in place?

Is it time to bring in a junior person to help you service your "B" and "C" Clients?

Register for the next Webinar...

For the June 29th at 11 AM Central Time go to:
http://awc.omnovia.com/registration/pid=67831275837619

For the July 1st at 2 PM Central Time go to:
http://awc.omnovia.com/registration/pid=34991275838063

Seating per webinar is limited to 10 people each.

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Everyone who registers for this webinar will be offered an incredible assessment that measures how you think. If you've ever wondered why you're not reaching your potential, this assessment will give you clear insight as to why. By understanding your thinking patterns you are empowered to manage your thoughts more intentionally and get better results. The assessment includes a free 30-minute consultation with Ed Howat, a practice management coach. Isn't it time to start thinking about thinking, maximize your strengths and be the person you always thought you could be?

For more information, contact Jim Buchanan at

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