

HELLO, POLICY REVIEWS

The nice thing about life insurance reviews is you've either proved the policy continues to work in your client's best interest, or you've pleasantly proven there's a better strategy for them.

When you take the initiative to review in-force insurance policies, clients appreciate it. And, we find that our advisors appreciate it, too. Here's the outlay for a firm who actively performs policy reviews and the impact to their firm. This is what can happen just by asking to review in-force policies. Talk about bottom lines...



Common areas we see policy improvements:

	Long-term care risk: hybrid products <i>1 per month</i>	\$76k revenue
	Life insurance in retirement plans <i>1 per month</i>	\$108k revenue
	Legacy planning <i>1 per month</i>	\$130k revenue
	Gift of a lifetime <i>1 per month</i>	\$54k revenue
	Disability gap <i>1 per month</i>	\$42k revenue

**Incremental revenue
to the firm \$410k**