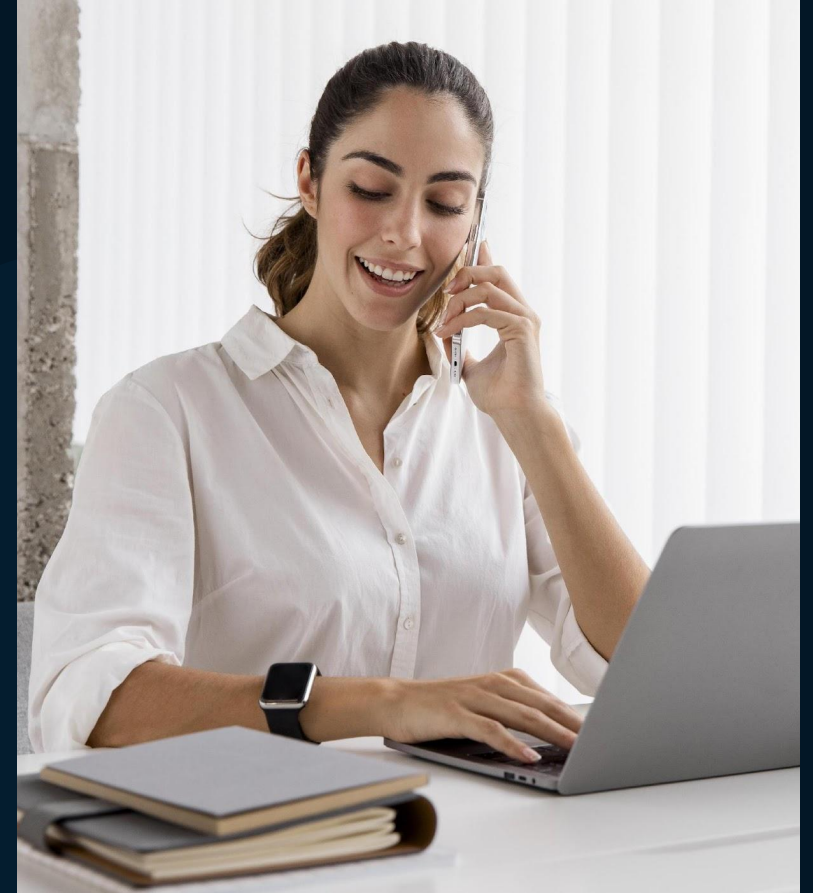


Understanding The Process



Understanding The Process



01

Connect With a Client

Use our mobile app or website to talk to clients looking for coverage!



02

Client Worksheet

It's our job to understand how to best help our clients and to find out what their health risks are.



03

Quote and Underwrite

Use our quote and underwriting tools to help you choose the right product and find something in their budget



04

Submit Application

Found a good fit? Submit the application on the carrier site.

01

02

03

04

STEP 1

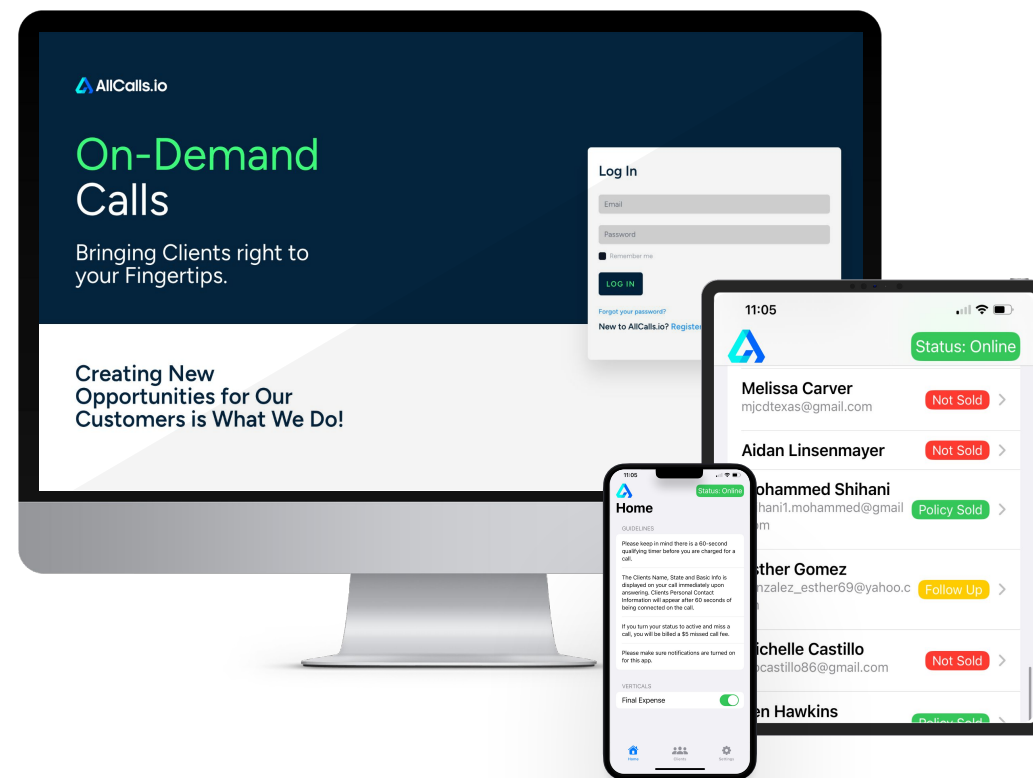
Connecting with Clients

Take calls when you want too
on your own schedule.

Use our state of the art technology and start **talking with interested clients** right from the website or mobile app.

After you've finished training you'll be able to fund your account and get started.

- ✓ 100% Lead Match!
- ✓ \$20 Calls for our Agents!
- ✓ On Demand Clients!



01

02

03

04

Quotes and Underwriting

STEP 3

After collecting your clients information in our worksheet, use your [FREE Insurance ToolKits account](#) and make sure you get your client approved the first time!

- ✔ Free for All Agents!
- ✔ Quote All Companies at Once!
- ✔ Get your client approved easier!

The desktop screen displays the 'Get a Final Expense Quote' form. It includes sections for Coverage Options (10,000 or Premium, Coverage Type: Level), About the client (Sex: Male/Female, State: Texas, Birthday: 6/11/1973, Height/Weight: 5'3"/196, Nicotine Use: None, Payment Type: Bank Draft/EFT), and Drug and Health Information (Heart Attack, Diabetic Neuropathy, Asthma). A 'Get Quote' button is at the bottom.

The tablet screen shows a list of insurance companies and their rates:

Company Name	Monthly	Coverage Type
MetLife of America	\$30.32	Living Promise Graded
American Amicable	\$26.14	Senior Choice RSP
Foresters	\$27.17	PlusRight Basic
corebridge Financial	\$36.58	Guaranteed Issue
CVS Health	\$26.94	Accredo MedNet
Americo	\$46.40	Eight Level
TRANSAMERICA	\$46.40	Innovation Solution Standard

01

02

03

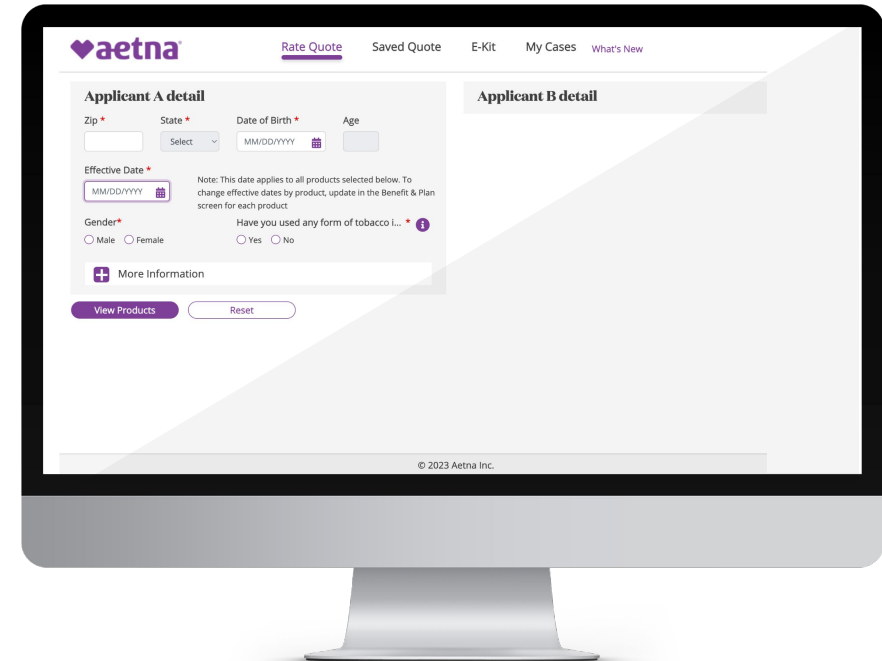
04

STEP 4

Submit Application

Every carrier is different, but **all applications are very similar.**

- ✓ Most Applications are like credit applications with medical questions.
- ✓ Most applications have versatile signature options.
- ✓ After Submission, some carriers will give you a accept or decline that instant!



Continue to the next video for more details....



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