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Who?

Why?

What?

How?

of Life Insurance Review,

Who?

Your Client

Why?

To ensure you are serving the needs of your clients over time and strengthen your book of business.

What?

What will your customers gain:

- The chance to consider the changes in their lives and financial situations
- The opportunity to adjust their life insurance coverage, or opt to keep their current policy
- Peace of mind, knowing they have proper policies that will take care of loved ones

What you gain:

- A chance to prove your interest and knowledge to your customers
- Loyalty that can last for years - even to the next generation
- The opportunity to build your business with existing customers and retain them
- Cross-selling opportunities
- Customer referrals

How?

1. (You) Ask your clients about their current life insurance coverage

- Does your coverage currently offer a chronic illness or LTC benefit?
- Would you be interested in a potentially lower premium for the same coverage?
- Have you had your policy reviewed in the last 3-5 years? If so, when and outcome?
- Have any of the following occurred since you purchased your policy?

- Change in health
- Recent inheritance
- Change in marital status
- Purchase a new home

- Change in employment/income
- Became a parent or grandparent
- Providing care or financial support to a family member
- Significant change in asset values

2. (You) Complete the Request for Inforce Illustration Form and submit to The Thompson Agency

- The Thompson Agency will request the illustrations from the carrier (this can take 7-10 business days in most cases).

3. The Thompson Agency will review the Inforce Illustrations and provide you with an analysis/summary report of their coverage along with recommendations. We will

schedule either a phone conversation or in person meeting with you to discuss the analysis.

4. (You) Schedule a follow-up meeting to review these results with your client and discuss the next steps if replacement options are available.

