



Helpful Tools Are Just A Click Away



Our Services

We listen to your needs, answer questions and provide the best options for you to take to your clients.

From advanced sales support, finding the right carrier for each case and navigating through underwriting to competitive analysis, providing point-of-sale materials as well as marketing and training, we do it all for you.

Marketing & Training Materials

Provide you with various insurance and marketing pieces to help you with sales ideas, statistics and contract features so you can increase sales and your bottom line.

- **Family Care Benefit**
- **Retirement Supplement**

Point of Sale Assistance

Provides one-page informational sheets, spreadsheets or needs calculators to assist you with closing the sale with your client.

- **Income Fact Finder**
- **Business Overhead Expense Worksheet**
- **Income Protection Worksheet**

Underwriting Guidelines

Provides pre-qualification questionnaires, build guidelines and other underwriting questionnaires and guidelines so you can provide clients with more favorable outcomes.

- **DI Health Pre-qualification Questionnaire**
- **Current Principal Build Guidelines**

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