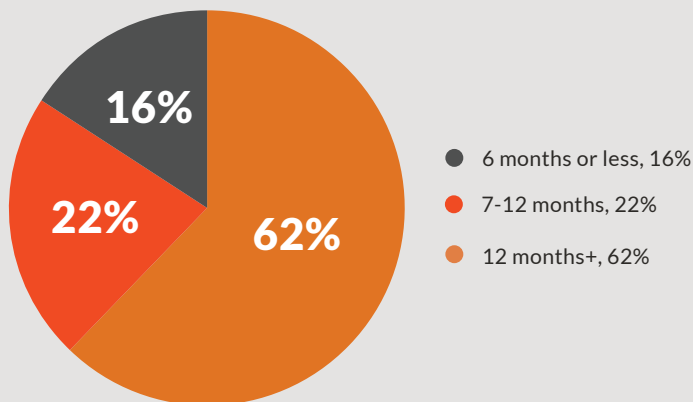


Successful Prospecting: Centers of Influence (COIs)

Successful Prospecting

Successful prospecting is the key to increased revenues. Aside from client referrals, working through centers of influence (COIs) clearly delivers the most desirable types of prospects.

As powerful as centers of influence can be at generating highly qualified leads and highly desirable new clients, productive COI relationships don't happen by accident.

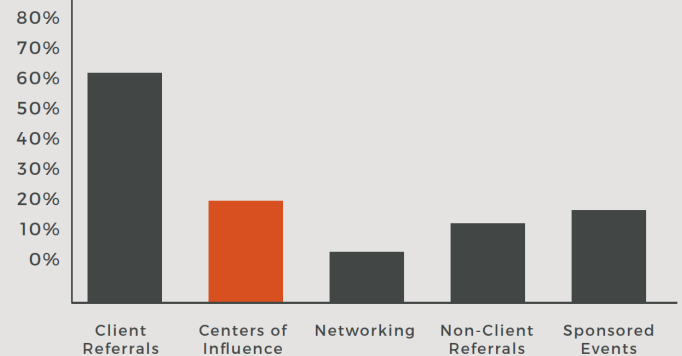


Proformex's Value Proposition for COIs

- Ongoing Policy Support
- Ongoing Policy Service

If you are working with Trust Managers, Proformex has an add-on solution for gifting, Crummey letter management, trustee access, and much more. Check with representative for details.

New client generation by source



A long-term undertaking

How long did you work with a COI before a referral was generated?

- Ability to prospect and work on policies you did not write (with express permission from your COI)
- Visibility and consolidation of all policies
- Automation of the ordering of all policy statements and illustrations
- Monitors individual policy performance based on customizable parameters
- Identifies 'at-risk' policies across entire insurance portfolio
- Generates annual reviews for all policies
- Provides connectivity for insurance consulting services

The Bottom Line

Advisors who distinctly define their area of specialization are more referable in the eyes of COIs. Providing intrinsic value that strengthens the COIs' client relationships provides you additional credibility and will reduce the time it takes to start generating referrals.

Nationally, 51% of policies need attention. Odds are the policies of your COI need your help. Further, your COIs likely are not life insurance experts, and could benefit from your expertise to determine whether a change in policy is needed to avoid potential catastrophes for their clients. Use Proformex to prove it!

Introducing Proformex to COIs differentiates you from your competitors and positions you as a life insurance specialist that provides banks, law firms, trust departments, family offices



of all policies nationwide require attention from a life insurance expert who can determine whether those policies are at-risk of failing

and foundations with tremendous and immediate value for them and their clients.

Proformex's inforce policy monitoring and management platform is designed to lower COIs' administrative costs, save them valuable time, reduce their fiduciary liability exposure, and support their trustees' duties while delivering their clients a world-class policyowner experience. To learn more about how Proformex can help get more referrals from COIs, [visit our website.](#)

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