



SALES & MARKETING SUCCESS SYSTEMS

SIMPLIFYING YOUR SALES SUCCESS



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iadbrokerage.com • 800.381.0977

01 • PRODUCT OFFERING

Access to the right products that fit your needs is essential to your business. We have curated a premium collection of over **30+ handpicked carriers across 15+ product lines.**

02 • LEAD GENERATION

Expand your sales reach with **FREE or discounted leads** through our **lead and marketing co-op programs.** Gain access to **carrier sponsored leads, direct mail programs, appointment set leads, live transfer and internet leads, just to name a few.** Additionally you will benefit from our no cost lead management and CRM system.

03 • TECHNOLOGY

We offer simple to use, agent and consumer friendly technology platforms that help your business grow. Make your job easier with our **sales and enrollment tools, state of the art website, online training academy, simple quoting tools, and contracting platform.**

04 • TRAINING & EDUCATION

IAD's goal is to not only connect you with the correct products, but to provide the training needed to be an expert in presenting them. We offer a multitude of training platforms and options across all of our product lines. These include **live sales events, a virtual training academy, weekly webinars, one-on-one coaching, on demand video education, cross-selling systems and much more.**

05 • SALES TOOLS

Become a sales pro with IAD's turnkey sales and marketing selling systems. These systems have been built for the following product lines: **Medicare Solutions, Long Term Care, Life/Final Expense, Annuities, and Limited Medical.**

06 • ADMINISTRATIVE SERVICES

Your time is extremely valuable, leave the time consuming tasks to our trained team of professionals. **Anything from contracting, policy issues, commission questions and tracking, new business processing, underwriting and much more.** IAD gives you more time to sell and grow your business.

07 • MARKETING SERVICES

Another valuable tool that we offer to our independent agents is access to our marketing and graphics team. We have a portfolio of marketing material that can be customized to your business, or we can custom build new items and a campaign just for you. Other services include: **website design and building, logo creation, business card layout, newsletters, postcards, door hangers, and other marketing items to set you apart from your competition.**





register at
www.iadbrokerage.com

QUOTING TOOL

insurancetoolsportal.com/iad



Medicare Supplement • Medicare Advantage Final Expense • Hospital Indemnity • Dental

- Compare rates of the top carriers
 - Run quotes that can be easily emailed, printed or saved
 - Compare Medicare Advantage and PDP plan benefits
 - Fill the Medicare Advantage gaps with the Hospital Indemnity comparison tool
 - Find the most competitive Medicare Supplement Plans for your clients
 - **New Products:** Final Expense, Hospital Indemnity and Dental
 - **New States:** MI, IL, IN, OH and TX
- and much more!**



Learn the Basics

- Medicare Supplement v. Medicare Advantage Agent and consumer Guide
- Medicare 101 - Parts A, B, C, D
- Understanding Medicare Supplement plans
- Medicare Parts A&B benefit charts
- DSNP Academy
- Group Medicare Solutions

Increase Sales

- Seminar Selling and marketing System
- Effectively overcoming objections
- Sales Presentation and outline
- Live agent training events
- Package & cross-selling tools

Access Resources

- Custom Medicare Supplement Quotes
- Carrier highlights
- Pre-approach letters
- Appointment setting scripts
- Video training series
- Customized Marketing Material
- Prospecting and lead programs

CALL **TODAY** FOR YOUR SUCCESS SYSTEM!



Learn the Basics

- What is Limited Medical?
- Basics of Limited Medical Plans
- Understand The Affordable Care Act
- Understand Current Market Landscape
- Understand ACA Mandate Repeal
- Understand the value of Limited Medical vs. Major Medical

Increase Sales

- Sales Presentation and Outline
- Effectively overcoming objections
- Limited Medical cross selling techniques and products
- Live agent training events
- Group Sales Training

Access Resources

- Third party articles
- Pre-quote Basic info questionnaire
- Limited Medical quick quote comparison sheet
- Health/Expenditures Statistics
- Quoting and Underwriting services
- Customized Marketing Materials
- Prospecting and Lead Programs
- Pre-approach Letters

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FIXED ANNUITIES



Learn the Basics

- Annuity features explained
- Pre-approach letters
- Quick tips for selling annuities
- Product Training Comparisons
- Annuity conversation starters
- Animated Videos

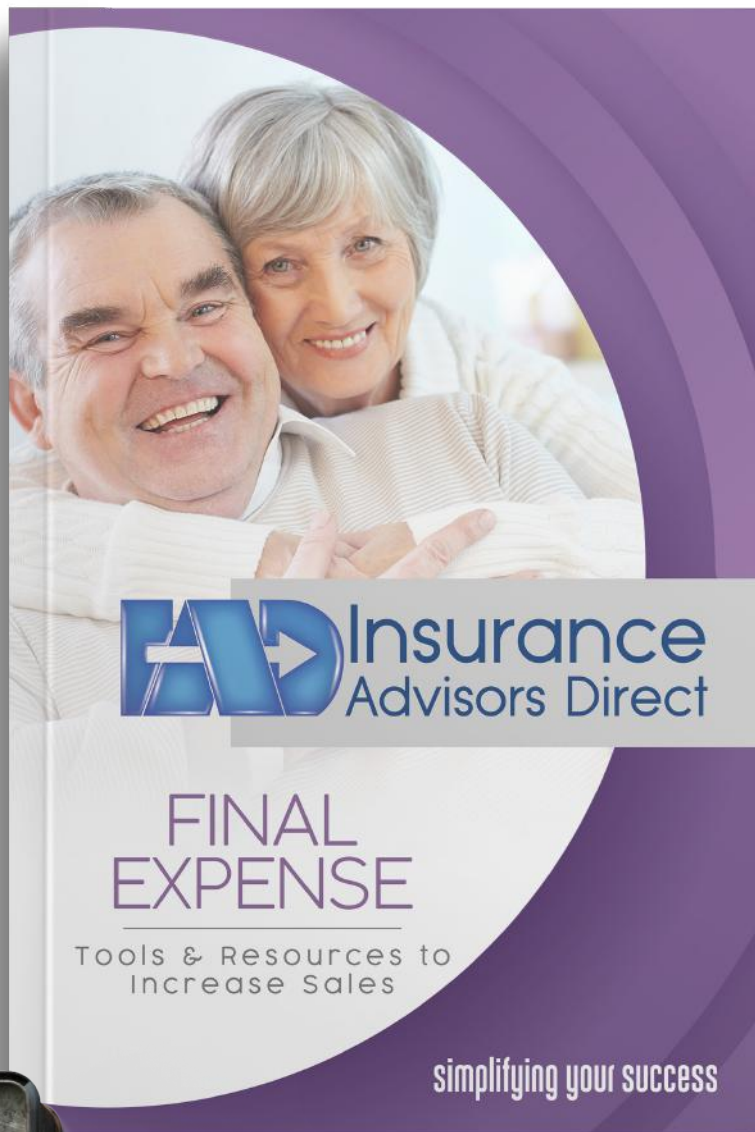
Increase Sales

- Sales Presentation
- Graphs, Charts and visual aids
- Effectively overcoming objections
- CD vs. Annuity Sales tool
- 4 Questions to ask every client
- Retirement Calculators

Access Resources

- Third party articles
- 10 Money Questions agents should ask
- Sales training events
- Customized Marketing Materials
- Confidential client information forms
- The power of tax-deferred growth
- Lead programs
- Retirement Roadblock Platform
- White Papers

CALL **TODAY** FOR YOUR SUCCESS SYSTEM!



Learn the Basics

- Top 10 Reasons Consumers buy
- Top 10 Reasons you should be selling
- Pre-approach letters
- Important questions to ask
- Product Training Comparisons

Increase Sales

- Sales Presentation and Outline
- Proven closing techniques
- Effectively overcoming objections
- Referral system
- Appointment setting scripts
- Legacy Safeguard System
- Video Presentation
- Life Calculators

Access Resources

- Third party articles
- Online final expense quoting tool
- Final expense planning guide
- Sales training events
- Customized Marketing Materials
- White Papers
- Whole Life
- Single Premium
- Term
- Universal Life/Index Universal Life

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LONG TERM CARE



Learn the Basics

- What is long term care?
- Basics of LTC Policies
- Understand LTC Hybrid Alternatives
- 7 Reasons why people buy LTC
- Sales and Educational Manual

Increase Sales

- Sales Presentation and Outline
- Effectively overcoming objections
- Medicare Supplement cross selling techniques
- SNF/HHC Supplement Form
- Live agent training events

Access Resources

- Third party articles
- "Protecting Your Nest Egg" Booklet
- Policy & Social benefit sales chart
- 4 Questions to ask during interviews
- Quoting & Underwriting Services
- Customized Marketing Materials
- Prospecting and Lead Programs
- Pre-Approach Letters

CALL **TODAY** FOR YOUR SUCCESS SYSTEM!

GET MORE INFORMATION AND TOOLS FROM IAD!

Fill out the form below to receive additional information from Insurance Advisors Direct and start growing your sales!

First Name:			
Last Name:			
Phone Number:			
Email:		Zipcode:	
Check this box if you would like to be contacted by IAD in the future: By selecting this box, you are opting-in and authorizing Insurance Advisors Direct Agency, LLC. to contact you regarding insurance matters.			<input type="checkbox"/>
Please select the products that interest you (click all that apply):			
Limited Medical	<input type="checkbox"/>	Long Term Care	<input type="checkbox"/>
Fixed Annuities	<input type="checkbox"/>	DSNP	<input type="checkbox"/>
Final Expense/Life Insurance	<input type="checkbox"/>	Group Medicare	<input type="checkbox"/>
Medicare	<input type="checkbox"/>		
Check this box if you are NOT interested in being contacted by IAD: By selecting this box, you are opting-out from being contacted by Insurance Advisors Direct Agency, LLC.			<input type="checkbox"/>