



Creating Revenue within Your Book of Business

Cross-Selling Opportunities

Producer Book Opportunities:

- Do you have business clients where there is more than one owner/partner?
- Do you have business clients where the owner has family members working in the business that one day could be the next owner?
- Do you have clients who have an executive team or highly compensated/valued employee(s)?
- Do you know executive team members and highly compensated employees are being discriminated against by even the best group employee benefit plan?
 - Did you know there are 3 tiers of income protection?
 - Group, Group Supplemental, High Limit Income Protection.

Client Questions to Open Doors With:

- When was the last time you reviewed your business valuation?
- Did you know that a buy-sell agreement should be supported in two ways – Life Insurance and Disability Insurance?
- Does the insurance that protects your buy-sell agreement still meet your financial goals?
- When was the last time you reviewed your life insurance policy?
 - Carriers have introduced new policy enhancements within the last two years.
 - Would you like our life insurance specialists to provide an assessment of your current policy?
- Voluntary Benefits – in a competitive marketplace for employees – if you didn't have to pay for the benefit, would your employees or independent contractors value access to individually owned insurance coverage?

Within A 20 Minute Meeting:

- We will identify opportunities and provide you the confidence to generate new business.
- Partnership: Your clients, our back-office support, we can teach, partner, or lead.
- Not licensed or appointed with a carrier, no worries, we have solutions for that situation as well.

From discovery to client engagement to policy delivery. IWS helps you drive sales and deliver organic growth.

People don't wake up in the morning and say, "Today is the day I'm going to buy insurance."
People buy because someone asked a question and inspired action.

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