



A promise is a commitment to do something backed by a plan of how to get it done well. Successful insurance professionals always have a plan. And in our dynamic industry - with evolving products, rates and rules - the best professionals know the value of leveraging a team that has diverse expertise to help them build and execute a winning plan.



InsurMark
Delivering Promises

InsurMark delivers the tools and support you need to succeed in meeting the promises to those you serve.

Our Corporate
PHILOSOPHY

HONOR GOD IN ALL WE DO

EXCEL WITH OUR AGENT PARTNERS

HELP PEOPLE DEVELOP

GROW PROFITABLY





InsurMark has grown into a well established national insurance marketing organization with representation in all 50 states. The company follows the passionate enthusiasm and leadership of Founder and CEO Steve Kerns and President Carolyn Luby.



InsurMark
Delivering Promises

800-752-0207
www.insurmark.net

Assistance & Solutions that Guarantee Success

Accessibility and commitment to service are trademarks of the expert staff at InsurMark. Specialization in the wholesale distribution of fixed annuities, life insurance, and long term care insurance allows us to offer expert service. Our focus and deepest desire is to help you grow and succeed in your business.

A talented staff of Personal Annuity and Life Sales Consultants as well as Sales Support Specialists diligently and carefully select resources that help you get new appointments and find the right solutions to close more sales. You will quickly see that everyone is dedicated to serving independent insurance professionals who are working to grow new and profitable businesses through strong and supportive relationships.

To support your sales and marketing efforts, InsurMark also provides:

- ▶ **Training** to educate and differentiate.
- ▶ **Software** to personalize solutions.
- ▶ **Incentives** to reward and grow.
- ▶ **Seminar marketing** and client presentations that simplify complex ideas.

Since our industry is one of product, comparison and service, our InsurMark Personal Annuity Consultant Team (IMPACT) strives to **outpace the competition** by providing an outstanding high-growth environment characterized by consistent service and added value that is second to none.



Whether it is reviewing applications before submission or following up on pending cases, you have our promise that we will do everything we can to get you paid as quickly as possible. We take care of the details so you can focus on selling.

History

In 1983, founders Steve and Becky Kerns were inspired to form a company called InsurMark that has become well known in the insurance industry for its integrity and dedication to service. Since the beginning, strong corporate values prompted InsurMark to pioneer the personal annuity consultant concept, which has become an exemplary model for the industry.

A Solid Foundation Proven by the Test of Time

Others try to replicate the foundation we created over 25 years ago – but no one has yet to compare. Our history of industry leadership is a testament to the company's culture of stability and longevity. Our framework creates success for insurance professionals and includes: unprecedented business growth and increases to our agents' bottom lines.



The BizBucks™ program is a great resource and the training programs are super. InsurMark offers the freedom, loyalty and service I need to grow my business.

Todd V. – Louisiana

It's the people I work with at InsurMark, including my Personal Annuity Consultant, that help me get through anything.

John G. – Oklahoma

Given the tumultuous environment that currently exists for independent producers, it is more important than ever to partner with an independent marketing organization that truly has the best interest of the producer as their focus. The commitment, dedication and effort that Steve, Carolyn, and everyone at InsurMark have displayed ensures that their producer partners continue to have the appropriate product solutions available and is a testament to that focus.

Mark Heitz
President, Sales and
Distribution
Aviva USA

Fast Cash Referral Bonus: Referring a NEW agent could mean up to a total of \$5,000 in your pocket and \$1,000 from your referral's first life or annuity case.

National Ethics Bureau Membership: Integrity is the cornerstone of InsurMark's entire organization. That's why we can provide you with NEB membership. It's another way you can set yourself apart from the competition.

E&O Coverage for Less: Another way InsurMark increases your bottom line! You are eligible to save up to 50% on E&O coverage through our partnership with the NEB.

CE For Life

And So Much More!



High-Level Training

The 15-Minute Spotlight: 15-minute online events on hot products and topics of our industry.

The Fischer Experience: Learn professional selling strategies from a 40-year Wall Street Insider that work every time. This EXCLUSIVE training event could literally change your business and your life.

IRA Institute: IRA training that shows you how to increase your average case size to well over \$250,000 along with unique, powerful tools to help clients.

The InsurMark Producer Forum: While we offer many value added services and distance learning opportunities, nothing beats the ability to spend face-to-face time with our team.



Seminars & Client Presentations

Risk Free Seminars: Our results-based marketing program is proving to be the most productive and cost effective way to prospect for new clients in a volatile economy. Available exclusively from InsurMark, the program utilizes field-tested and results proven IRA and Income Planning seminar presentations combined with guaranteed reservations. We provide you a higher return on the hard earned dollars you invest towards your success.



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InsurMark is one of the premier independent marketing organizations in the industry. People, Partnership, and Passion are what separates them from the competition. Their employees are always going above and beyond, their partnership with the producers is second to none, and their passion for this business is what makes them so successful. Thanks Steve, Carolyn and all of InsurMark for everything you do!

Eric J. Thomes, CLTC
Senior Vice President
of Sales
FMO Distribution
Allianz Life Insurance
Company

Fast, friendly, and accurate services are not only hallmarks of success, but also the principles practiced daily by InsurMark. From the friendly voices that answer the phones to Sales Consultants that work with agents daily, even Senior Management; InsurMark goes the extra mile to ensure agents' needs are served. One need not look any further than InsurMark!

Russell A. Smith,
CLU, ChFC
Torimax Financial
Group, Inc.
Canyon Lake, CA

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You Present: InsurMark offers these client presentation tools to assist you in delivering current, concise and compliant resources to your clients.

- **Forefield Advisor:** Deliver high-quality advice during every client contact with this powerful client interaction and presentation solution.
- **9 IRA Mistakes:** Customizable client presentation that shows 9 IRA mistakes that could derail most retirement dreams.
- **Tax or No Tax:** Customizable client presentation that shows how to protect a family from probate, reducing taxation of social security benefits, increase savings growth, and how to benefit from the new IRA Rules.
- **CD Owner Questionnaire:** Simple, clear questions that provide important facts you need while determining the right product fit for your client.



Lead Generation & Prospecting Tools

ClientCreator: Grow faster by working smarter with this targeted tool to add 20 to 30 fresh new prospects to your book of business each month.

Pre-Set Appointments

Direct Mail

Seminar Marketing

Society for Financial Awareness (SOFA): Get more qualified prospects and exposure in your community as a financial educator through SOFA. This non-profit organization also provides coaching, seminar scripts, and professional partnerships. This cost effective prospecting strategy of offering "Lunch & Learns" will benefit your community and your growing business.

Celebrity Club: If you are ready for celebrity status, we have a plan for you - a full-service lead generation program springboards off your very own radio show! This turnkey system is complimented by direct mail and a full support staff that keeps the leads coming as fast as you can take them.



Even before the sales process begins, InsurMark is ready and waiting to assist all of your needs. Please call us with any questions. We look forward to hearing from you.

Our Corporate PHILOSOPHY



HONOR GOD IN ALL WE DO

Do the right thing.

Treat each person with dignity and respect.

Respect each other's spirituality.

EXCEL WITH OUR AGENT PARTNERS

Serve others as we would be served.

Stand behind our work.

HELP PEOPLE DEVELOP

Help people to do their best every day.

Build proud, dynamic teams.

Help people reach their goals.

GROW PROFITABLY

Act as good stewards.

Constantly improve and innovate.

Meet our commitments.

InsurMark

Delivering Promises

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