Winning at the intersection of **WEALTH MANAGEMENT** and **ANNUITIES**

What a partnership with InsurMark can do for your organization.

- Best interest annuity recommendations, including innovative exclusive distribution products.
- More productive advisors prepared to meet customer and regulatory demands.
- Larger share of wallet.

In today's volatile economic environment, clients need options to address a variety of challenges and fears.

InsurMark offers one-on-one support and superior product options advisors can utilize to help clients address concerns about volatility, fixed income alternatives, longevity risk and healthcare risks, while providing solutions to better address estate and income taxes when transferring wealth.

Our breadth of diverse product options focus on improving client outcomes.

Clara

Our best interest annuity (FA, FIA, MYGA, RILA) recommendations are difference makers.
Clara is InsurMark's proprietary, end-to-end electronic annuity platform. Clara gives advisors access to data-driven tools across a highly curated marketplace of products. It streamlines annuity order entry and minimizes NIGO apps. And it gives an advisor visibility into their book of annuity business with Lifecycle Manager.

The InsurMark marketplace gives advisors access to the most innovative, limited distribution annuity products. It includes both brokerage and advisory annuity options, along with rich data-driven tools to compare and present the products.

Annuity conversations have never been easier.

But there's an added plus to Clara over other order entry systems: A 24/365 sherpa. Every advisor has an Advisor Development Consultant to help them navigate Clara and all InsurMark's tools, technologies and processes.

Our timely training and business building programs help advisors gain a larger share of wallet.

When changes in legislative, regulatory or economic environments arise, we bring advisors the expert insight and training they need to help existing clients adjust.

InsurMark also offers relevant and timely education and business building programs that expose opportunities to help advisors gain a larger share of wallet from current clients, along with turnkey marketing programs to attract new assets.

Our fintech tools, support and coaching help advisors become more productive.

We provide advisors with the tools they need to simplify, manage and grow their businesses, while making it easier to meet ever-evolving regulatory and customer demands. With InsurMark's industry best fintech solutions, coaching and back-office support, advisors can focus more on revenue generating activities and less on crippling, administrative tasks.

A partnership with InsurMark gives your advisors access to:

- **Hubbard**, the real-time business dashboard designed exclusively for advisors.
- **Catalyst**, the marketing-made-easy, award-winning automated growth platform with customized website and branding included.
- **Clara**, the industry-first, human-centric annuity platform, focused on outcomes, not containers.
- **Virtual Assistants**, who mind administrative details, so advisors can focus on generating revenue.
- **Business Coaching**, with dedicated Advisor Development Consultants and senior leadership who help advisors go from good to great.

A few of our thought leaders and training presenters include:

Roger Ibbotson Ph.D.
NYSE Zebra Edge Index and Fixed Indexed Annuities: Consider the Alternative White Papers

David Blanchett Ph.D. CFA CFP
Head of Retirement Research for Morningstar's Investment Management Group

Michael Kitces
MSFS, MTAX, CFP, CLU, ChFC, RHU, REBC, CASL. Head of Planning Strategy, Buckingham Wealth

Stephanie Bogan
Business Strategist, High-Performance Practice Coach, Author, Speaker, Entrepreneur

Wade Pfau Ph.D. CFA RICP
Professor of Retirement Income, RICP Program Director, Co-Director of New York Life Center for Retirement Income

Ed Slott CPA
IRA Distribution Expert, Professional Speaker, Television Personality and Best-Selling Author

Jamie Hopkins
ESQ., CFP, Head of Wealth Solutions, Carson Wealth

Julie Littlechild
Founder and CEO at Absolute Engagement, Author of the Pursuit of Absolute Engagement

Mary Beth Franklin
Contributing Editor at Investment News, Specializing in Social Security, Medicare and Retirement Income

Jeff Levine CFP
Forbes Contributing Editor, Educator, Speaker, Tax and Retirement Super-nerd; The Type of Person Who Actually Enjoys Reading Through Tax Code

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Dr. Robert Shiller
Investment Characteristics of FIAs

Dr. Jeremy Siegel
Stocks for the Long Run

Ready to start winning at the intersection of wealth management and annuities?
Contact us today to learn more about InsurMark's products, fintech solutions, education and training that can propel your advisors to greatness and set up your organization for continued success.

InsurMark
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Level Up in 2023.

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