

Introducing

The Life Settlement Selling System™.

This simple, step-by-step system will show you why and how to easily incorporate Life Settlements into your practice. It also contains tips on how to acquire high net worth senior prospects and introduces tools that can be used to offer the product to these target clients.

The information general principles and conclusions presented in this report are subject to local, state, and federal laws and regulations. All financial professionals are responsible for complying with all local, state, and federal laws and regulations.

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The following questions will be answered throughout this presentation.

- **Why incorporate Life Settlements into your practice?**
- **What is the ideal candidate profile for a Life Settlement?**
- **How to incorporate Life Settlements into your practice?**
- **How can I use this product to acquire new senior clients?**
- **How to get started using this selling system?**
- **Who is Insurance Strategies Group, LLC?**

Why incorporate Life Settlements into my financial practice?

- **Demonstrate value to seniors by utilizing ISG’s H.E.L.P. (Help Eliminate Life Premiums) program, while maintaining coverage.**
- **Proactively introduce a funding tool to purchase more beneficial financial products, such as Annuities, Long Term Care, or a more appropriate Life Insurance policy. Life Settlements can result in “Found Money” for financial planning.**
- **Help clients recover premiums from their initial investment**
- **Possible life settlement commissions.**
- **Fulfill fiduciary responsibility of informing your client of a regulated viable financial option.**

Ideal Life Settlement candidates:

- **Senior clients over the age of 70**
- **Senior clients still paying life insurance premiums**
- **Senior clients approaching you to consider surrender or lapse of their policy**
- **Senior clients considering a 1035 Exchange**
- **Proactive Approach – Identify any senior clients that would benefit from doubling or tripling the cash surrender value of their current policy**

*How to Incorporate Life Settlements into
your Financial Practice.*

- 1. Review your portfolio of clients who own life insurance and are 70 years of age or older.**
- 2. Use our Life Settlement Qualifier to select the top ten prospects.**
- 3. Use our Insurance Valuation Proposal to introduce the Life Settlement option to your clients.**

How to Incorporate Life Settlements into your Financial Practice. (continued)

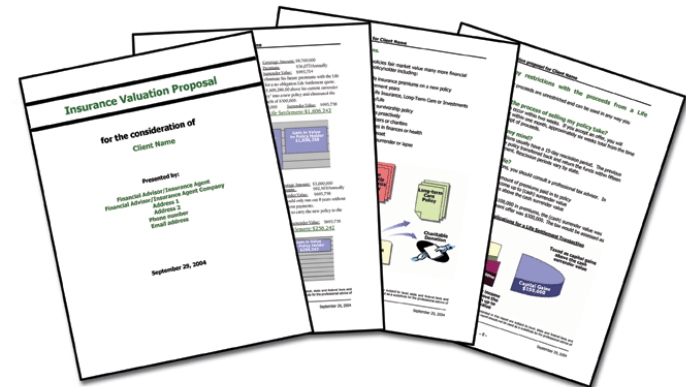
- 4. Complete our simple Quote Form.**
- 5. Submit the Quote Form to receive multiple settlement offers.**
- 6. Insert the Life Settlement offer amount into a more beneficial coverage or product quote (the additional funds created by the Life Settlement often create more advantageous options).**
- 7. Present the more advantageous strategy to the client for acceptance.**

How to use this product to acquire new high net worth senior clients.

- **Advertising - Make use of our private label, life settlement ad to advertise in senior publications.**
(ISG, LLC provides a private label print ready layout for you to customize with your own company information. This will allow you to seamlessly integrate life settlements into your practice.)
- **Direct Mail - Obtain lists of high net worth senior clients in your licensed area and mail ISG's private label postcards to these prospects.**
- **Presentations - Introduce prospective seniors to life settlements using our private label slide show presentation.**

The Life Settlement Selling System™ provides you with Complete Private Label Marketing Support.

- **The Life Insurance Valuation Proposal©**
a general principle client introduction document
- **The Life Insurance Valuation Slide Show©**
- Client forms & worksheets
- Direct mail postcard templates
- Industry advertisement templates
- Client brochures
- Web based for accessibility



About Insurance Strategies Group, LLC



We provide financial advisors and producers with the most comprehensive life settlement, insurance, and annuity strategies found in the financial industry today. We offer the strength and stability of a national industry leader coupled with a deep understanding of senior insurance and financial services.

Advantages we provide

We are a single source for all of your insurance and life settlement needs. ISG will work with you to develop the proper case strategy and perform the necessary underwriting and policy valuation services. You will have more time to focus on your clients and growing your business.

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