

# The Value of AimcoR

## Our 5-Step Approach

		TOOLS	THE STORY	DIFFERENCE MAKERS
1	Concierge Gateway	<ul style="list-style-type: none"> <li>Point-of-Sale Expertise</li> <li>Robust Virtual Sales Support - Neutral solutions</li> <li>Fully Staffed Local Support</li> <li>Single Source Underwriting for all Carriers</li> <li>Top-level case management and support</li> <li>Due diligence and documentation support.</li> </ul>	<ul style="list-style-type: none"> <li>Our pre-sale access, tools and experience insure you, your advisors and their clients tailored solutions that addresses their specific needs</li> <li>By aligning with an AimcoR firm you are gaining access to the top carriers in our industry and our dedicated underwriting and service teams that work exclusively with AimcoR Group.</li> </ul>	<ul style="list-style-type: none"> <li>One Resource to Call</li> <li>Multiple Carriers through one Relationship</li> <li>Access to Industry and Subject Matter Experts</li> <li>Top Level Relationships with the Carriers</li> </ul>
2	Locally Coordinated	<ul style="list-style-type: none"> <li>Local Relationship Management</li> <li>Compliance and Suitability Procedures</li> <li>New Business Operations Protocol</li> <li>National Coverage</li> </ul>	<ul style="list-style-type: none"> <li>We understand the value of having a local relationship and ensuring that your advisors have partners in the field. With AimcoR you get both. Top down account management to partner with your corporate team and individualized relationships with your advisors.</li> </ul>	<ul style="list-style-type: none"> <li>The ability to forge deep relationships</li> <li>Overreaching approach that breeds consistency but also individualized support</li> </ul>
3	Turk-Key / Simple Packaged Solutions	<ul style="list-style-type: none"> <li>Ongoing education</li> <li>Training and Practice Enhancement Meetings</li> <li>Centralized web solutions and tools</li> </ul>	<ul style="list-style-type: none"> <li>At AimcoR we appreciate and understand that insurance solutions are not your core focus. As a result, we provide you and your advisors simple, streamlined approaches for training, identifying client needs, and fulfilling applications.</li> </ul>	<ul style="list-style-type: none"> <li>Crawl, Walk, Run (You choose)</li> <li>We can operate on three different levels                             <ul style="list-style-type: none"> <li>We can sell for your advisors</li> <li>We can sell with your advisors</li> <li>We can support the advisors that choose to sell themselves.</li> </ul> </li> </ul>
4	Inforce Management	<ul style="list-style-type: none"> <li>Conversion Reminders</li> <li>Inforce Illustration Departments</li> <li>Data Mining Capabilities</li> <li>Inforce Policy Management Capabilities</li> </ul>	<ul style="list-style-type: none"> <li>We start where others stop. AimcoR is dedicated to service beyond the sale and working with our institutional partners to identify potential opportunities and help you meet or exceed the fiduciary responsibilities that your advisors hold with their clients.</li> </ul>	<ul style="list-style-type: none"> <li>We take a proactive approach to helping you manage your inforce blocks of business.</li> <li>Many times we will uncover potential shortfalls in the inforce block and can work to provide solutions before they become unavoidable.</li> <li>By offering this service our partners see increases in client retention.</li> </ul>
5	True Partner	<ul style="list-style-type: none"> <li>Meeting and Convention Support</li> <li>Annual In-Person meeting with key stakeholders</li> <li>Transparent and Compliant Relationships</li> </ul>	<ul style="list-style-type: none"> <li>Without regular communication, true partnership is unattainable. We take a proactive approach to engaging with your organization at all levels and ensure open communication between both parties.</li> </ul>	<ul style="list-style-type: none"> <li>We work "Through Your Grid" and increase revenue inflows from insurance products.</li> <li>Our team partners with your compliance and suitability departments.</li> <li>We manage to revenue and service goals for better, more consistent results.</li> </ul>

**AimcoR Can Help:** We function as wholesale practice management consultants for insurance and protection planning solutions. For information on AimcoR please contact 866.428.0108 or visit us at [www.aimcorgroup.com](http://www.aimcorgroup.com)