

Davis Life Brokerage

Your Financial Services Partner . . . For Life.

Life
Checkup Assistant™



For agent use only. Not to be used with the public.



- **When life changes – there’s often a change in your clients’ insurance needs.**
- **Timing is EVERYTHING – How many times have your clients said, “I did not know you offered that?!”**
- **Blame is sometime unfairly directed at the insurance professional when policies are not up-to-date or when unforeseen risks strike.**
 - Life Checkup Assistant™ is a tool to prevent this
 - Life Checkup Assistant™ allows you to capitalize on the opportunity that the changing nature of life presents



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- Periodic checkups with a medical professional keeps your client's physical well-being healthy
- Periodic checkups with you, an insurance professional, keeps your client's financial well-being and insurance coverage healthy.
- Your fiduciary responsibility and personal liability will be covered with LCA!



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How Does LCA Work?

1. Agent gathers email addresses from client base.
2. Davis Life customizes agent's emails and online form to agent's specifications.
3. Agent emails or mails client base at regular intervals .
(monthly, quarterly, etc.)
4. Internet leads are received and tracked by Davis Life and sent to agent within 24 hrs.
5. Appointment postcard templates are available.
6. Not sure what to recommend? Contact us!



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2 Key Tools

- **Online Life Checkup Form**
- **Marketing/Client Communications**

- Gather email addresses
- Deepen relationships to recognize your clients' recent changes in life
- Follow up from the Life Checkup Form

Both are customizable!



Online Life Checkup Form

You will be provided a unique webpage link.

Customizable features include:

➤ **Header**

- Company Info
- Name
- Photo

➤ **Check boxes**

➤ **Closing Message**



The screenshot shows a web form titled 'Financial Solutions, LLC' with contact information '800-747-5612 | David@DavisLife.com'. The form is addressed to 'David Biede | Financial Solutions, LLC' and contains a message: 'Even if we do not want it to, life is going to change. To better serve your needs, please take a moment to identify any changes that have occurred in your life. Please check all the changes or concerns below to inform us of how we can better assist you in meeting your insurance needs and financial goals.' The form lists three categories of changes with checkboxes: 'Change within the family' (New child, New grandchild, Change in marital status, New job or promotion, Retirement, Health concerns, Quit Smoking, Death, Other), 'A change in what you own' (Purchase of home, Sale of home, New investment, Acquired assets, Sold assets, Major investment gain, Major investment loss, Receipt of inheritance, Other), and 'A change in your business' (Start/purchase a business, Gain/loss of business partner, Major asset purchase/lease). Three red arrows point to the 'Change in marital status', 'Acquired assets', and 'Gain/loss of business partner' options.

Financial Solutions, LLC
800-747-5612 | David@DavisLife.com

David Biede | Financial Solutions, LLC

Even if we do not want it to, life is going to change. To better serve your needs, please take a moment to identify any changes that have occurred in your life.

Please check all the changes or concerns below to inform us of how we can better assist you in meeting your insurance needs and financial goals.

Change within the family

- New child
- New grandchild
- Change in marital status
- New job or promotion
- Retirement
- Health concerns
- Quit Smoking
- Death
- Other

A change in what you own

- Purchase of home
- Sale of home
- New investment
- Acquired assets
- Sold assets
- Major investment gain
- Major investment loss
- Receipt of inheritance
- Other

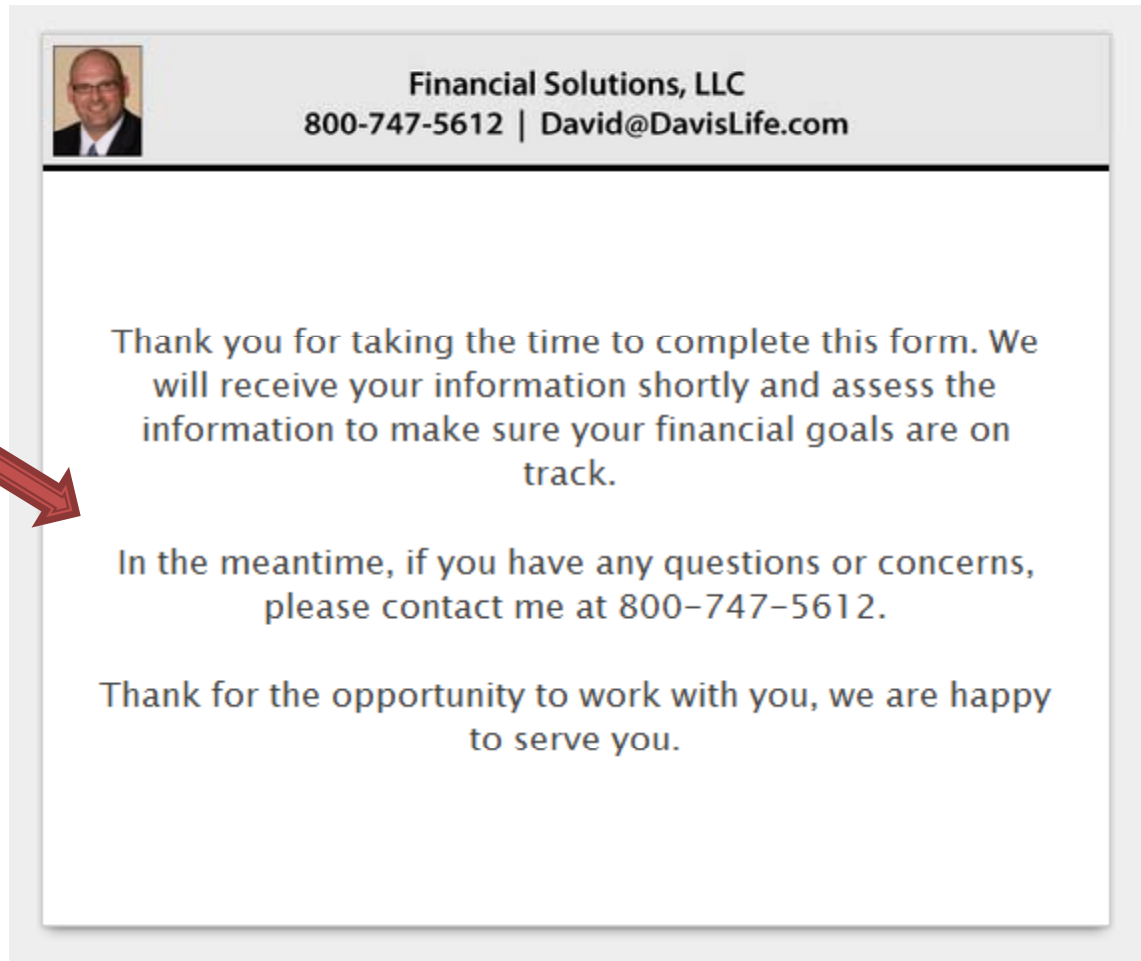
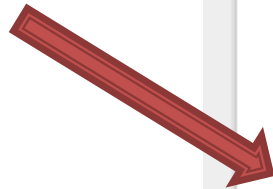
A change in your business

- Start/purchase a business
- Gain/loss of business partner
- Major asset purchase/lease

Online Life Checkup

Customizable features include:

➤ **Closing Message**



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Online Life Checkup Assistant™ Form



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Mailers for Marketing

- Email Request
- New Baby/Grandbaby Congrats
- Retirement Congrats
- New Home
- New Job

Customizable
Backside!



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As your life changes, so do your insurance and other financial needs. Plus, the financial industry is frequently introducing wonderful new solutions that didn't exist yesterday.

I would like to keep you up-to-date with information that could be helpful to you as your life changes and as financial offerings change.

Today, I sent you this message via the mail. Tomorrow, to serve you better, I would like to send you messages via email. Would you please provide me with your email address?

Simply send me an email at:

YourEmail@emailaddress.com

Thank you for trusting me with your insurance and other financial needs.

Company Name
Agent Name
Phone Number

Logo
Company Name
Address
City, State Zip

PLACE
POSTAGE
HERE

Client Name
Address
City, State Zip



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We're Here to Serve You.

**We would appreciate
your feedback to make this
as effective as possible.**



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