MVP Financial Services, Inc.

# Life Insurance Policy Review e-Kit

| Consumer Pieces | |
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| Consumer Brochure | This **customizable PDF** brochure is great for non-traditional life insurance producers to highlight policy review as an added service with their clients. **Target: Producers with a retail location such as P&C agents.** |
| Prospect Letter | Having a **customizable Word doc** letter that advisors can send promoting policy review can be a great way to equip non-traditional advisors with a simple non-intrusive way to begin prospecting for life insurance. **Target: Advisors with a sizable client base looking to engage in new opportunities.** |
| Life Insurance Policy Review | A **customizable Word doc** and comprehensive life insurance policy review kit that is designed to equip advisors with a step by step guide complete with a scorecard comparison. This kit and the carrier illustrations are all the advisor needs to perform a complete review. **Target: Non-Traditional advisors that need a roadmap when meeting with their clients to perform a policy review.** |
| Life Insurance Policy Review Summary | This condensed kit only includes the key data and recommendations. Still fully **customizable Word doc**, this kit was designed for the traditional advisor in mind that is accustom to working with their clients on policy reviews but still includes the scorecard to compare policies. **Target: Traditional advisors.** |

| Producer Pieces | |
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| Advisor Guide | Life insurance policy reviews are something that should be a main focus in your practice. This PDF kit provides data and research discussing the opportunity and need for policy reviews. **Target: all advisors.** |
| Talking Points | For non-traditional advisors, here are the conversation starters you need to identify policy review opportunities with these simple talking points (PDF). **Target: Advisors that need assistance incorporating policy review into their client meetings.** |
| Advanced Marketing Ideas | Highlighting the importance of life insurance policy reviews at a more advanced level (PDF). **Target: All advisors** |

| MVP Tools | |
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| MVP White Paper | This PDF piece discusses the new opportunities that exist with policy review following the downturn of guaranteed universal life and highlights living benefit riders as the new differentiators when looking to replace current inforce policies. |
| MVP Playbook | Looking for opportunities after the sale? This brief playbook discusses ways to engage your case management department in helping identify additional sales opportunities after underwriting is complete. This is a great way to bring added value to your advisors and engage your team in uncovering additional opportunities. (PowerPoint) |
| MVP Additional LIPR Opportunity | A simple one page **customizable Word doc** cover letter that can be added to the top of a newly issued policy to show the advisor that additional opportunity exists. Use this piece and an inforce authorization as a way to generate additional sales for those clients that have other insurance inforce that may need to be reviewed. |