



LIFE ASSURANCE 360™

OVERVIEW

The Life Assurance 360™ Process is our approach to designing, implementing, and managing life insurance. We have found that when equal consideration is given to carrier strength, product design, obtaining favorable underwriting results, and ongoing policy management, the results are exponentially better for clients than when any one of these areas are addressed in isolation. Knowing this, we feel it is our duty as professionals to take a comprehensive, 360° approach to life insurance.

FOUR KEY AREAS ADDRESSED BY THE LIFE ASSURANCE 360™ PROCESS:

STRENGTH | selecting companies committed to policyholders for the long-run

Tool: STAR Rankings™

PURPOSE | designing plans to achieve intended purpose

Tools: Life Assurance Design Questionnaire™ & Life Assurance Blueprint™

UNITY | unifying plan design with medical underwriting

Tools: Underwriting Advocacy™ Program & PURE™ Process

ASSURANCE | providing ongoing policy service

Tools: Policy Service Agreement™ & TOLI Vault™

