

# OUTSOURCED INSURANCE DESK

LIFE | LONG TERM CARE | DISABILITY

## QUANTUM PARTNERS WITH YOU TO MOVE BUSINESS FORWARD

The sales conversation is where you shine. You build relationships, uncover client needs and recommend solutions. But once a client says “yes,” the product positioning, carrier selection, underwriting strategy, paperwork accuracy, follow-up, and case management begins.

That’s where we step in as an extension of your team.

### Our experienced specialists work directly with you to:

- Discuss product options and carrier strategies
- Evaluate underwriting pathways
- Guide clients through the next steps
- Complete and manage all required paperwork
- Submit business efficiently and accurately

*We help you deliver a polished, professional experience - without getting buried in administrative details.*

### When could the Outsourced Insurance Desk be valuable to you?

If you:

- Prefer spending time with your clients rather than completing forms
- Have limited administrative support
- Want confidence that applications are completed correctly the first time

Let us take care of:

- Full application preparation and completion
- Medical requirements
- Outstanding requirements
- Client follow-up

**You focus on the relationship. We handle the forms, signatures, and submission logistics.**

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