

OUTSOURCED INSURANCE DESK

LIFE | LONG TERM CARE | DISABILITY

QUANTUM PARTNERS WITH YOU TO MOVE BUSINESS FORWARD

Success Stories

Advisor with \$400M AUM

Scenario: An advisor that specializes in business owners has a healthy book of business, but wanted to expand his insurance offering to better match his clients' needs.

Solution: Our OID worked hand-in-hand with the advisor to put in place a business owner insurance platform. This platform offered his clients a way for them to better plan for succession, protected their business and reward key employees. The advisor began implementing these solutions into their presentation to clients and when further detail or application processing is needed, the advisor contacts the OID team. The OID team consults with the client on the solutions and completes all of the paperwork. The advisor increased their insurance production from \$100k to \$1M in the first 12 months.

Annuity Focused Agent

Scenario: A successful annuity agent fluent in indexed annuities, wanted to build his life business. With his experience on the indexed side, he was comfortable in having the discussion about the advantages of the products with his clients, but did not want to deal with the time and paperwork that life insurance demands.

Solution: He began marketing and speaking with his clients about indexed universal life and its advantages. When he had a client that was interested he referred them to the OID and we handled the entire application and case administration process. The agent went from minimal life production to seeing \$36k of production after 3 months of beginning the process.

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

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