

News and Business Drivers

August 29, 2023



Two-minute update



Rachel Smith, Senior Director of Account Management, delivers pertinent updates to increase your revenue.

[Watch video](#)

September is Life Insurance Awareness Month

Help easily build your book of business with new clientele and conduct policy reviews with existing clients by incorporating life insurance into your conversations in September with these client-facing Life Insurance Awareness Month materials from Concourse:

- [Your Guide to Life Insurance](#)
- [Life Insurance Needs Analysis](#)
- [Intro to Life Insurance flyer](#)
- [Life Stages flyer](#)

Life Insurance Awareness Month resources

- North American has a library of [marketing materials](#) to help you promote the importance of life insurance, including a [marketing guide](#).
- Protective's [interactive guide](#) walks you through the process of talking to clients about their life insurance needs – and shows how incorporating life insurance into your practice can fuel your business growth.

Carrier updates

- Upcoming webinars:
 - [Concourse Financial Group Agency – August 30 at 9 a.m. CT](#): Join a one-hour virtual orientation for new producers highlighting website demonstration, who to contact and simple sales ideas.

Life insurance and underwriting updates

- **Underwriting Spotlight with Wendy Arther:** The Concourse underwriting team is often asked, *Is this client insurable with this history?* There are a few conditions we often see that are not only insurable but, in many instances, are only mildly rated. [Learn more](#).

Annuity updates

- [View top annuity rates](#), as of August 28.

Hybrid long-term care (LTC) updates

- Mutual of Omaha is having an LTC sales contest that can help you earn a 5% bonus! [Learn more](#).

Insights from Ronnie Hamilton, Advanced Sales

Last week at our Advanced Sales Symposium, Mark Berry from John Hancock gave an excellent presentation on the subject of Tax Ready Retirement. This is a visual way to talk to top clients about the taxes they're going to face in retirement, and how they can potentially diversify to help manage these taxes. [Learn more](#).



Getting started

**August 30,
9 a.m. CT**

Join a one-hour virtual orientation for new financial professionals and assistants.

[Register now](#)



Forward trip

July 24-28, 2024

Earn points and qualify for our annual incentive trip to Boston, Massachusetts. More information to come.



Tip: Keep cases moving

When you submit an annuity application, always include an illustration to avoid processing delays.

Your way forward.

Connect with Concourse



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