



News and Business Drivers

August 22, 2023



Two-minute update



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

[Watch video](#)

Offer tax-advantaged ideas to business owners

A solid estate plan can help business owner clients pass along more of what they worked so hard to build. The Connelly case shows how life insurance and this advanced strategy can be a solid solution when paired with proper planning. It also reminds business owners how partnering with a financial professional to stay connected to the rules of estate planning can save them from making costly mistakes.

Ready to learn more? [Read about the Connelly case](#), courtesy of Lincoln.

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

- SBLI has made significant updates to their underwriting program [AcceleRate](#).
- John Hancock has [made improvements](#) to their Protection Term and Vitality Term products.
- Prudential has [enhanced pricing](#) on VUL Protector® with updates to BenefitAccess Rider (BAR) in New York.

Annuity updates

- [View top annuity rates](#), as of August 21.

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

September is Life Insurance Awareness Month, which is a great time to talk to clients about their life insurance needs. Life insurance can fuel your business growth and increase revenue, all while helping you protect more families. Protective's easy-to-use guide walks you through the process of getting started. [Get the guide](#).



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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