AFFIRM® FOR LIFE

A WIZARD-BASED COLLABORATIVE SELLING TOOL

AFFIRM® for Life is a wizard-based, collaborative selling and processing solution, designed to guide advisors throughout the entire life insurance selling process while providing a high-level of interaction with the carriers and BGAs who support their selling activities. AFFIRM for Life enables customized compliance review by regulated financial institutions with integration to validate license and appointment status for advisors.

BENEFITS OF COLLABORATIVE SELLING

The entire industry benefits from AFFIRM for Life and a collaborative selling approach. It expands carriers' distribution of insurance products significantly by allowing financial advisors to confidently and compliantly sell life insurance to their clients. It enables our BGA partners to diversify, open a new line of business and drive incremental revenue. It gives financial advisors a simple, repeatable, controlled process for selling life/health insurance to their clients. It provides complete compliance with FI regulations and oversight to look at the case throughout the entire process.

SELL MORE, FASTER, WITH EFFICIENCY

There is always a need to expand business and increase revenue. AFFIRM for Life presents a unique and exciting opportunity for carriers, distributors and financial institutions to do both of these things. It equips advisors to confidently sell life and health products by giving them electronic access to carriers products, enabling them to select the best fit for clients and initiate an application in real-time, immediately. The whole process is transparent and flexible to meet the process and compliance needs of everyone in the sales process.

ELIMINATE ALL THE RISK

Financial advisors are very protective of their clients – as they should be. With AFFIRM for Life, advisors can expect a fully compliant, accurate, controlled, simple process for protecting their clients with life and health insurance. It gives advisors access to hundreds of life and health insurance products, the experience of BGAs and/or call centers for fulfillment and insight into the process so they can communicate expectations with clients and the ease of processing life and health insurance electronically.

www.ipipeline.com | sales@ipipeline.com | 800.758.0824

FEATURES

- Access to life insurance products, including term life, universal life, whole life, variable life, long term care and disability income
- Built-in support for suitability and compliance management
- e-Signature to accelerate and simplify the selling activity
- Choice of a drop ticket model or 100% completed Part I and Part II applications and forms
- Real-time status updates to users and business partners throughout the process
- Standardized compliance approach for validation, surveillance and supervision across all sales
- Full end-to-end set of integrated components
- Self Service Question Management, Approval Queues and Forms Mappings

BENEFITS

- Supports collaborative selling model for life insurance products
- Customized workflows and suitability reviews to ensure SEC, FINRA and state compliance
- 100% "in good order" submissions increases placement ratios
- Allow advisors to tap into the knowledge and selling skills of BGAs
- Enables advisors to provide a value-added service by selling insurance to their portfolio clients
- Wizard user interface is pre-filled-- Data may also be fed into the form with varying CRM and back office systems
- Eliminates cycling resulting from incomplete and inaccurate information