

Advanced Sales Forum

Collaboration is the Key to Success



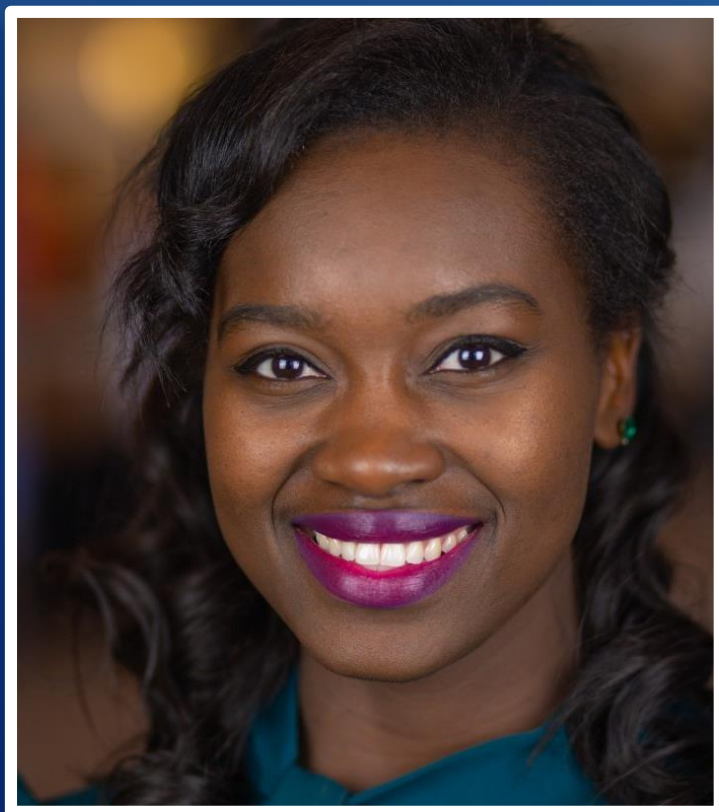


Andrew Rinn

AVP-Advanced Strategies

Sammons Financial | Life Division

MEET THE PANEL



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Advanced Planning Consultant
Guardian Life



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AVP-Chief Underwriter
Sammons Financial



Navigate With Confidence

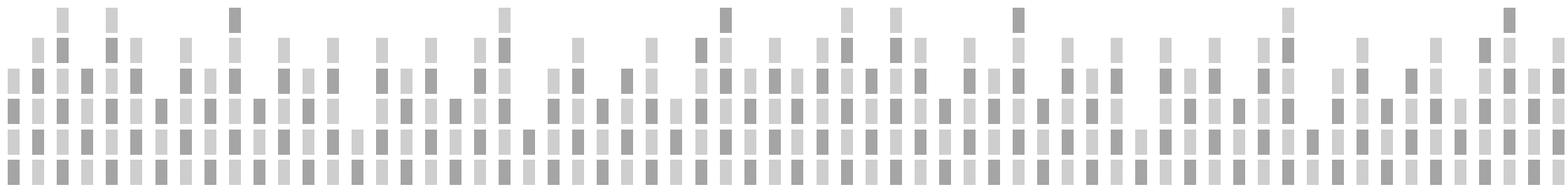


Setting boundaries...

- Role of advanced markets
- Role of underwriting
- Where is the overlap?



The Stakeholders



OWNERS



COMMUNITY



CREDITORS



SUPPLIERS



EMPLOYEES



CUSTOMERS



INVESTORS



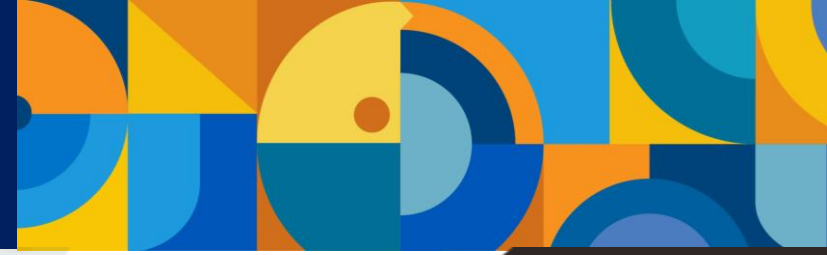
GOVERNMENT



PARTNERS



Tools of the trade



Advanced Markets

Underwriting



Who makes the final call?

- Insurable Interest
- Financials
- Business Valuation
- Sales Strategies
- Cover Letters
- Training
- Others



Wins and lessons learned



Questions?



Thank You



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SECURITY

TRUST

2023

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