

AiM Policy Review

“AiM” for the most out of life

Leverage the Power of AiM Policy Review

The **AiM Policy Review** from e4 Brokerage helps advisors and their clients maximize their life insurance policies. The process takes advantage of the latest innovations, products, and financial strategies available.

The three-step process can help you evaluate your clients' current policies. We provide you with guidance on the various and continual changes in the life insurance industry (interest rate changes, new health classifications, carrier ratings changes, etc.) and ensure that your clients are getting the most out of their life insurance policies and annuities.

3 Steps

Analyze • Improve • Maximize

Analyze - Our agency will take an objective look at your policies, one by one. We review why the policies were originally purchased and whether they still meet the clients' financial objectives. We incorporate new obligations and goals in your clients' lives, along with other issues that affect their life insurance needs. We also make certain your policy performs as you planned, isn't underfunded, and that it will be there whenever it is needed.

Improve - Once we have completed that analysis, we will help you compare your clients' current policies to others available in the marketplace. We may find that the policies continue to be well suited to their financial needs. But we often discover that their program can be improved, taking advantage of the latest innovations and improved pricing available in the industry. We will ensure that you are working with top rated carriers that are highly regarded in the industry. e4 Brokerage brings you access to the top-rated financial carriers, so we'll present comparisons that provide improved performance, not just lower premiums or increased coverage.

Maximize - Your clients' long-term financial interests are our top priority. We go beyond analysis and improvement of your clients' policies and find ways to meet their goals for the future.



People Making a Difference!

2280 45th St. South, Suite C, Fargo, ND 58104
Phone: 701-356-1270 ext. 202 • Fax: 855-381-3335
www.e4brokerage.com

For Licensed Insurance Agent Use Only. Not for use in solicitation or advertising to the public.