



The Brokerage, Inc.

www.thebrokerageinc.com

Who is The Brokerage, Inc.?

- National Marketing Organization, founded in 1976
- Based in Lewisville, TX
- Markets insurance services through independent agents
- Contracts at the highest possible commission levels, with recruiting contracts available

Who is The Brokerage, Inc.?

A member of numerous national insurance organizations:

- The Marketing Alliance
- The National Association of Independent Life Brokerage Agencies
- The American Association for Long Term Care Insurance
- The Brokers Health Insurance Network
- The National Association of Health Underwriters
- The National Association of Insurance & Financial Advisors

Who is The Brokerage, Inc.?

We offer a full Medicare product portfolio:

- UnitedHealthcare
- Aetna/Coventry
- Baylor Scott & White
- Blue Cross Blue Shield
- Care'N'Care
- Cigna/HealthSpring
- Humana
- Memorial Hermann
- AARP
- Assured/Woodmen of the World
- BCBS
- CIGNA
- Gerber
- Humana
- Medico
- Mutual of Omaha companies
- Sentinel Life
- Standard Life & Accident
- Transamerica
- plus
- Senior's Choice

What The Brokerage, Inc. Offers

We offer a full insurance portfolio:

- Life Insurance & Annuities
- Final Expense Life Insurance
- Long Term Care
- Disability Income
- Individual Major Medical (ACA compliant programs)
- Group Major Medical
- Ancillary Benefits (Dental, STD & LTD, Vision, CI)
- Group Accident
- International Major Medical
- Short Term Major Medical

What The Brokerage, Inc. Offers

We offer vested contracts through our contracted carriers

- You own your business
- You are the Agent of Record (AOR)
- * Recruiting level contracts are available for many carriers

What The Brokerage, Inc. Offers

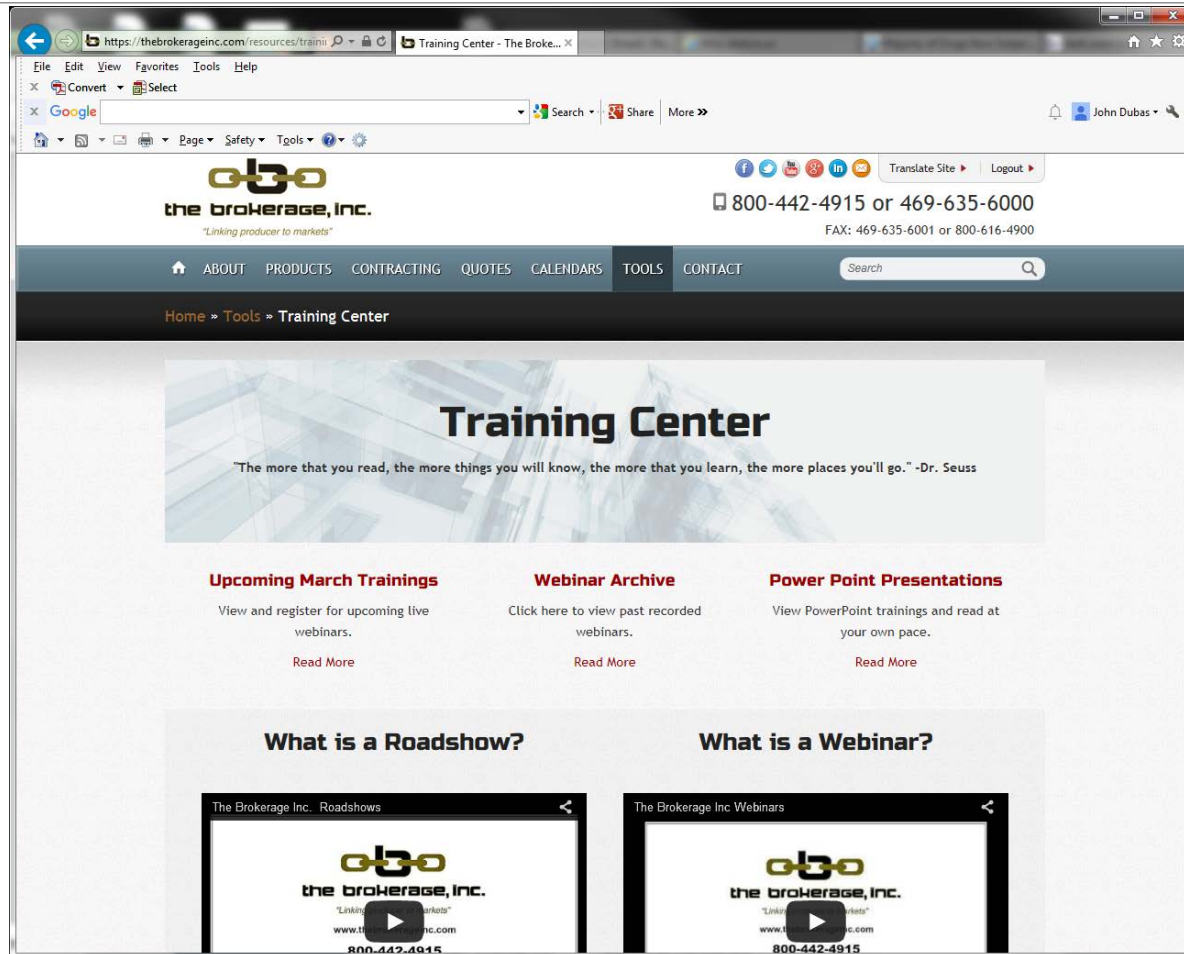
We offer E & O to qualified agents

- Must be appointed with the carrier through The Brokerage to qualify for the E&O coverage. Information about the coverage is sent to the carrier on your behalf.
- No expense – available without any cost to you.

You just ask!

What The Brokerage, Inc. Offers

We offer varied training programs and resources:



What The Brokerage, Inc. Offers

We offer Electronic support

- Access to multiple Medicare Quote Engines
- Access to other Quote Engines, for Life, Health, Final Expense, Long Term Care, and other products
- *Plus, a full menu of lead programs*

What The Brokerage Inc. Offers

Option A: Contact List

Custom List Volume-Based Pricing

A contact list custom ordered for you from a list vendor, based on the age range, income level and county you desire to work in. All contact names are scrubbed against the do not call list.

Keep in mind this list is purchased at a discount from an outside vendor and is distributed multiple times. And, not all carriers and programs allow for cold-calling.

Specifics are at www.thebrokerageinc.com, under the “LEADS” tab.

What The Brokerage, Inc. Offers

Option B: Community-Based Marketing

Complementary

Community-Based marketing programs create leads organically, and renew themselves, based upon agent performance. These programs include:

Retail Marketing: Through various contracted Medicare Advantage carriers, and other one-off opportunities, agents have the opportunity to take advantage of natural and driven store traffic to carrier-supported and self-augmented store-based marketing locations.

Look for trainings specific to marketing through retail locations on our website and in our agent communications.

What The Brokerage, Inc. Offers

Option B: Community-Based Marketing

Complementary

Faith-Based Opportunities: Group meeting opportunities through pre-screened faith-based locations.

Informational topics of interest (Medicare 101, LIS/MSP, LTCi, Life Insurance/Final Expense, Healthcare Reform, among others) are presented to the congregation supported by church leadership.

Live and recorded training webinars are available at www.thebrokerageinc.com.

What The Brokerage Inc. Offers

Option B: Community-Based Marketing

Complementary

Provider Marketing: Depending upon the product being marketed - referrals and lead collection from contracted network providers, or medical professionals positively affected by the proposed insurance offering.

Live and recorded training webinars are available at www.thebrokerageinc.com.

What The Brokerage, Inc. Offers

Option C: Carrier Generated Leads

Complementary

The Brokerage Inc. will at times have carrier generated prospects and/or recycled prospects. These prospects have responded to carrier solicitation or have been otherwise contacted, and have agreed to allow an agent contact them and discuss certain products.

This may not necessarily be a preset appointment. This may simply be a prospect that is expecting your call. These leads may be seasonal and subject to availability.

What The Brokerage, Inc. Offers

Option D: Direct Mail Programs

Cost Based on Extent of Use

The Brokerage Inc. has direct mail programs available for all product lines. Simply choose a mailer from our marketing portfolio and let the professionals handle the rest.

Different packages of mailers with discounts for Medicare Supplements; Final Expense; Dental, Hearing, Vision; Mortgage Life Insurance; Disability Income Insurance; Turning 65; and Medicare Changes are detailed on www.thebrokerageinc.com.

Our featured partner is [America's Recommended Mailers \(ARM\)](#).

What The Brokerage, Inc. Offers

Option D: Direct Mail Programs

Cost Based on Extent of Use

Our partnerships with different carriers also enable us to offer discounted direct mail programs targeting specific niche markets, including Medicare Supplements, Final Expense, and ancillary product plans.

Carriers include:

- Standard Life and Accident
- Legacy Safeguard/Monumental Life
- Mutual of Omaha
- Washington National

What The Brokerage, Inc. Offers

Option D: Direct Mail Programs

Cost Based on Extent of Use

- Medicare Supplement Carrier Production Support Program
 - Direct Mail responses to a generic Medicare Supplement Review letter will be distributed to agents holding certain carrier contracts with The Brokerage Inc. and placing business written from those responses with The Brokerage Inc.
 - The involved carriers:
 - United Healthcare
 - Cigna
 - Medico
 - BCBS
 - Aetna Continental Life
 - Mutual of Omaha affiliates
 - Standard
 - Transamerica

What The Brokerage, Inc. Offers

Option E: Internet Generated Lead Programs

Lead Cost Share Programs

The Brokerage Inc. contracts with multiple Internet Lead Generator Companies, with lead availability varying depending upon market and product selected.

Our featured partner is HealthPlanOne.

What The Brokerage, Inc. Offers

Option F: “Brokerage Bucks” Production-funded

Write eight (8) applications through The Brokerage Inc, within a thirty (30) day period, using these programs, and receive a complimentary 1,000 piece mailing through America’s Recommended Mailers (ARM) - :

- Medicare Advantage
- Medicare Supplement
- Final Expense
- Life Insurance
- Personal Major Medical
- Supplemental Medical
- Critical Illness
- Disability Income
- Annuities



*Certain additional limitations apply

What The Brokerage Inc. Offers

Option F: “Brokerage Bucks” *Production-funded*

Subscribe to mail 1,000 mailers each month for a minimum of four (4) months, using these programs, and receive a complimentary 1,000 piece mailing through America’s Recommended Mailers (ARM) - \$450 value!

- Medicare Advantage
- Medicare Supplement
- Final Expense
- Life Insurance
- Personal Major Medical
- Supplemental Medical
- Critical Illness
- Disability Income
- Annuities



*Certain additional limitations apply

What The Brokerage, Inc. Offers

We teach you to fish:

- Grassroots marketing efforts
- Faith based initiatives
- Provider based initiatives
- Regulation opportunities
- Retail marketing opportunities
- Regularly scheduled trainings & symposiums

We offer discounted Continuing Education credit online –
www.StateCE.com/tbi

What The Brokerage Inc. Offers

Share detailed presentations addressing many topics:

- Medicare 101/Medicare Made Clear
- Medicare Advantage Explained
- Medigap (Medicare Supplement Insurance)
- Medicare Part D
- LIS/MSP (Financial Assistance for Rx & Medicare Costs)
- Final Expense (Legacy Safeguard)
- Life insurance/Charitable Bequests
- Affordable Care Act

What The Brokerage, Inc. Offers...

We offer an explanation of the seemingly ever-changing regulations that affect your business.

We supply government and company information of the available Medicare health and drug programs.

We offer coaching for agents offering individual counseling to beneficiaries, as well as our group presentations.

Why we are here...

- ▶ Health care reform and the Accountable Care Act has people looking for information for questions on their own coverage, and that of family members.
- ▶ MIPPA (Medicare Improvement for Patients and Providers Act) has dictated plan changes for Medicare beneficiaries, creating confusion.
- ▶ Annual plan changes and notification of coverage (and information sent by the various carriers) creates questions.

We believe the answers to questions are found with you – the qualified insurance agent!

What we hope to accomplish...

- Offer us an opportunity to work with you, as *we want your business.*

To become involved...

Determine what is valuable for you to add to your personal marketing plan

Agree to move forward

Contract, Certify, Study

Commit to actively market, and follow through

Don't procrastinate!



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