

**Life Brokerage Living Promise
Marketing Plan**
(Fillable Word Document)



**Company or Agency
Name:** _____

Principal Name(s): _____

Date: _____

Final Expense Sales Overview:

- How much final expense Annualized New Business Premium did you sell in the previous year?

- How much final expense Annualized New Business Premium do you plan to sell in the current year?

- What is the average face amount for your final expense sales?

- What is the average premium amount for your final expense sales?

- Which carriers do you market final expense with and how much do you sell with each?

Carrier Name	ANBP
	\$
	\$
	\$

- What is your placement ratio for final expense sales?

- What are your 3, 6, 9, and 13-month persistency numbers for final expense sales?

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Agent and Producer Information:

- How many agents do you have contracted in your agency?

- How many producers do you currently have selling final expense?

- How many of these producers do you anticipate will sell our product?

- What is the organizational structure of your field force?

Marketing and Recruiting:

- What are your primary agent recruiting methods?

- How do you market final expense to your producers?

- How do you train agents to market final expense to consumers?

Leads:

- Do you provide final expense leads to your producers and how often?

- How do you obtain the final expense leads?

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Sales Projections:

- Please complete the following grid for sales projections of Applications and Annualized New Business Premium:

	Applications	ANBP
1 st Month		
3 rd Month		
6 th Month		
9 th Month		
12 th Month		

- How do you plan on monitoring sales and chargebacks for your agents?

Marketer Requirements:

Please list and describe any special requirements outside of our normal processes:

THIS PLAN MUST BE APPROVED BY THE VICE PRESIDENT OF BROKERAGE SALES, MUTUAL OF OMAHA

Mutual of Omaha Vice President of Brokerage Sales _____
(signature required)

Date: _____