



PARTNERED WITH THE NATION'S TOP PROVIDERS:



SINCE 2009

- GROWN FROM 66 TO 50K+ AGENTS
- OPENED 170+ OFFICES
- FOUNDED BY PATRICK BET-DAVID
- PROTECTED OVER 900K FAMILIES

7.1M SUBSCRIBERS



VALUETAINMENT

#1 CHANNEL FOR ENTREPRENEURS



1:19:15



95% OF PEOPLE

- PAYCHECK TO PAYCHECK
- LITTLE TO NO SAVINGS
- RENTING
- 65+
- 401K PLAN
- SOCIAL SECURITY

\$100,000



5% OF PEOPLE

- INVESTMENTS
- STOCKS
- MUTUAL FUNDS
- INSURANCE
- OWN PROPERTIES
- AT AGE 50+
- FINANCIAL FREE

3 TYPES OF TRAINING



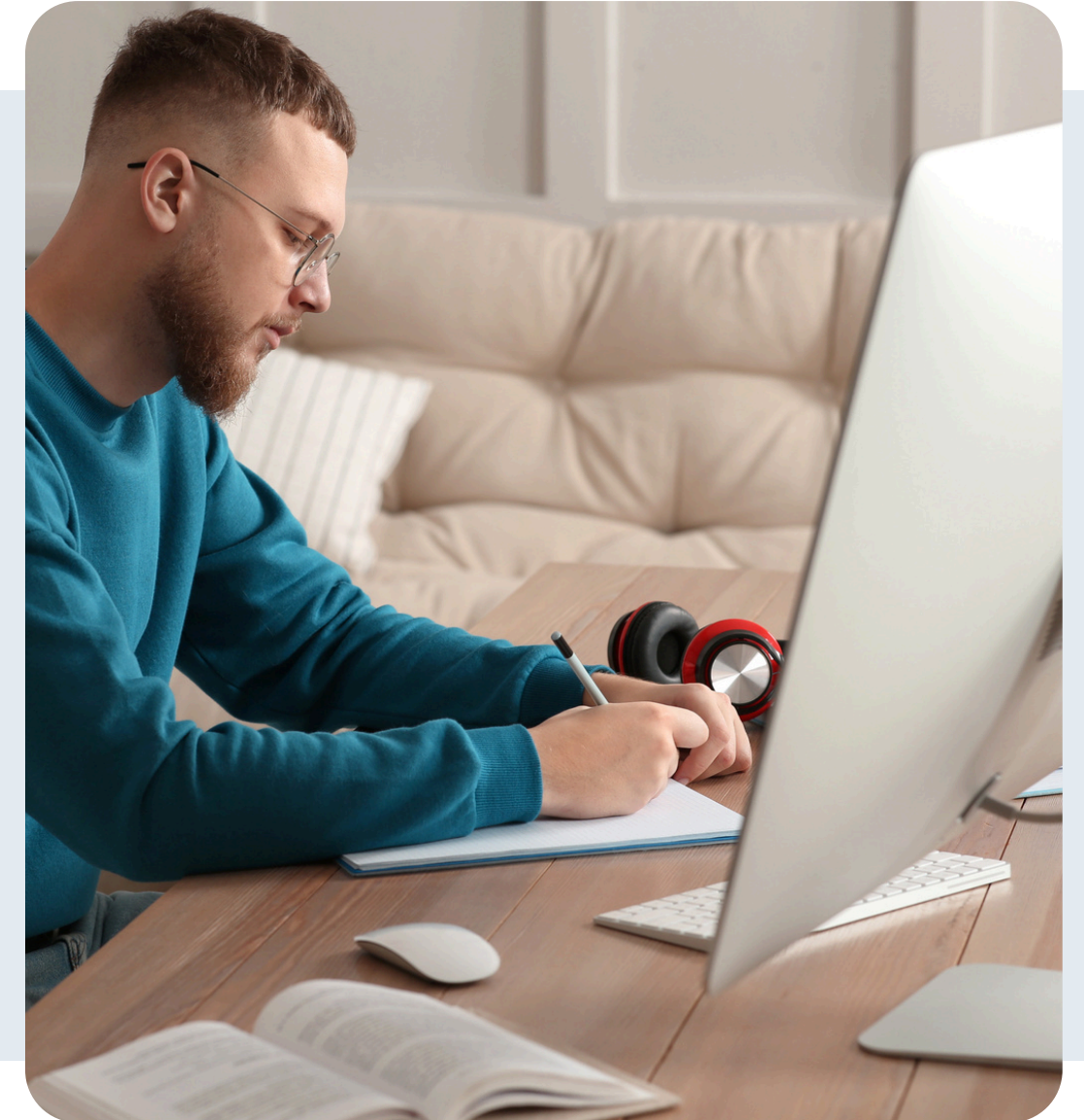
IN-PERSON TRAINING:

- **WEDNESDAY** 7-9 PM
-HOW TO RUN A BUSINESS
- **SATURDAY** 10-12 PM
-HOW MONEY WORKS



FIELD TRAINING:

SHADOWING AN EXPERT
UNTIL YOU BECOME AN
EXPERT



LICENSING:

- A. ONLINE CLASS
- B. STATE EXAM
- C. FINGERPRINTS
- D. LICENSING APPLICATION



GETTING CLIENTS



**ALL OF OUR CLIENTS COME FROM
WORD OF MOUTH, REFERRALS, &
SOCIAL MEDIA**

**WE DON'T DO COLD CALLING,
DOOR TO DOOR, OR BUY LEADS**



- AGENT EDUCATES CLIENT ABOUT **LIFE INSURANCE & RETIREMENT.**
- AGENT FINDS THE **BEST COMPANY FOR THE CLIENT.**
- COMPANY **COMPENSATES THE AGENT.**

**CLIENT PAYS \$0
FOR OUR SERVICES**
NO MARKUPS TO ANY COST

GETTING CLIENTS





WHAT SEASON OF YOUR LIFE ARE YOU IN?



MAKE EXTRA INCOME



**BUILD A LEGACY FOR
YOU & YOUR FAMILY**



COMPENSATION

PART TIME

2 CLIENTS PUT AWAY \$200 A MONTH INTO A POLICY

- $\$200 \times 12 = \$2,400$ TARGET PREM/PTS
- $\$2,400 \times 2$ CLIENTS = $\$4,800$
- $\$4,800 \times 50\% =$
 - **\$2,400 MONTHLY INCOME**
 - **\$28,800 ANNUALY INCOME**

BROKER

10 LICENSED AGENTS

- EACH LICENSED AGENT WRITES 4 POLICIES A MONTH
 - @ \$200 A MONTH PREMIUM
- $\$200 \times 12 = 2,400$ POINTS
- $2,400$ POINTS $\times 4$ POLICIES = $9,600$ POINTS/ MONTH
- $9,600$ POINTS $\times 10$ LICENSED AGENTS = $96,000$ POINTS
- **BROKER SPREAD (25%) = \$24,000 MONTH / \$288K ANNUALLY**

RESIDUAL INCOME

YOUR RESIDUAL INCOME INCLUDES YOUR PERSONAL POLICY + TEAM POLICIES

- MOST CARRIERS PAY 3% + IN RESIDUAL
- EX: TOTAL POINTS = $\$11,310,000$ (5 YEARS)
- $\$312,870 \times 20\% = \$46,931$ RESIDUAL
- **TOTAL = \$66,754 RESIDUAL EVERY YEAR!**

INTEGRITY PARTNERSHIP

- THE COMBINATION OF THE **VALUATION OF YOUR BUSINESS**
- THE VALUE OF YOUR EQUITY **(IS IT GROWING OR IS IT DECLINING?)**
- YOUR BUY OUT OPTIONS!

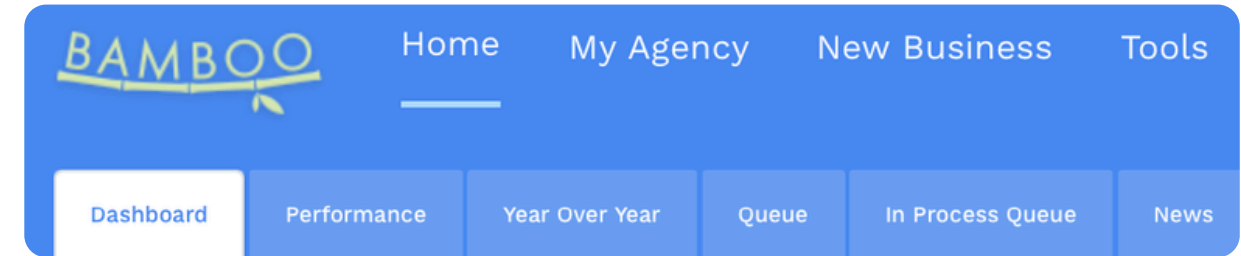


WHAT YOU NEED TO GET STARTED

HOW URGENT ARE YOU?

Time Commitment

- No hours, and no quotas.



\$199 Software "Bamboo"

- Submit policies electronically through all carriers.
- Manage your clients.
- Manage your agents.
- Manage licensing information.
- Training videos.
- FLS software.

BACKGROUND

- ✗ MISDEMEANORS
- ✗ FELONIES
- ✗ TAX LIENS
- ✗ BANKRUPTCIES

Licensing cost varies per state. Agent code is a tax write-off at the end of the year.