

A Producer's Guide to Brokerage General Agencies And Other Wholesalers 2007

Welcome to LIFE INSURANCE SELLING's 10th annual "A Producer's Guide to Brokerage General Agencies and Other Wholesalers." This guide includes alphabetical listings for 77 brokerage general agencies (BGAs) and other wholesalers throughout the United States. We also present an easy reference chart (starting on this page and continuing on page 56) that shows which product categories each firm offers.

In addition to the product listings, the BGAs and wholesalers that participated in this survey have provided information about how they support producers' marketing efforts and whether they offer support via the Internet. We encourage you to follow up with any BGA or wholesaler that captures your interest to find out more about the firm's offerings.

In mid-March, this report will be posted in a password-protected area of our Web site, www.lifeinsuranceselling.com, accessible only to subscribers. Some of the firms that participated in this survey have established hyperlinks from their listings within the online survey to their own home page. Simply click on the boxed-in company name to go directly to that site.

As you work to place new business, enhance old business, or move into more advanced markets, we hope this guide will serve as a useful resource.

—The Editors

I/R Code: 600.04 Brokerage Business

Companies	Accident Insurance	Cateteria plans/Section 125	Critical Illness	Disability Insurance	Employee Benefits	Final Expense Plans	Fixed Annuities	Graded Death Benefits	Health/Medical Plans	Health Savings Accounts	Impaired Risk Life	Impaired Risk Disability	Index Annuities	International Insurance	Investments	Jumbo Cases	Life Settlements	Long-Term Care	Section 401(k) Plans	Single Premium Whole Life	Survivorship Life	Tax-Sheltered Annuities/ Sect. 403(b)	Term	Universal Life	Variable Annuities	Variable Life	Variable Universal Life	Whole Life
Advanced Settlements, Inc.																												
America's First Financial Corp	•		•	•			•	•			•	•	•				•	•			•	•		•	•	•	•	•
AMZ Financial Insurance Services, LLC.					•			•								•								•	•			•
Annuities Exchange		•						•																				
Annuity Store, The								•																				•
Ardan Group, Ltd., The																												
Art Jetter & Company	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•	•	•	•	•	•	•	•	•			•	
Ash Brokerage Corp.			•	•			•	•								•	•	•				•	•	•	•	•	•	•
Benefit Program Services, Inc.				•			•	•			•	•	•	•		•						•	•	•	•	•	•	•
Blumberg Financial Services, LLC			•	•			•	•	•		•	•	•		•	•			•			•	•	•	•	•	•	•
Bogdan and Associates, Inc.							•				•		•			•						•	•	•	•	•	•	•
Brokerage Unlimited, Inc.							•				•		•			•						•	•	•	•	•	•	•
Brokerage, Inc., The	•		•	•	•	•	•	•	•	•	•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Brokers Clearing House, Ltd.			•	•			•				•		•			•	•	•	•	•	•	•	•	•	•	•	•	•
Brokers International, Ltd.							•				•		•			•						•	•	•	•	•	•	•
Brokers Resource Group					•	•	•	•	•				•			•							•	•	•	•	•	•
Champion Agency, Inc.			•	•	•		•	•			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Colonial Brokerage House, Inc.					•		•				•		•			•	•	•	•	•	•	•	•	•	•	•	•	•
Creative Marketing International Corporation						•	•	•			•		•									•	•	•	•	•	•	•
DAI (Dworkin Associates, Inc.)				•	•	•	•	•			•	•				•						•	•	•	•	•	•	•
Davis Life Brokerage				•			•				•		•			•	•	•	•	•	•	•	•	•	•	•	•	•
Disability Insurance Services			•	•								•						•										
DNA Brokerage							•						•									•	•	•	•	•	•	•
ECA Marketing, Inc.							•						•			•						•	•	•	•	•	•	•
ELA Settlement Services, LLC													•															
Elite Marketing Group	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

Brokerage General Agencies and Other Wholesalers

<i>Companies</i>	Accident Insurance	Cafeteria plans/Section 125	Critical Illness	Disability Insurance	Employee Benefits	Final Expense Plans	Fixed Annuities	Graded Death Benefits	Health/Medical Plans	Health Savings Accounts	Impaired Risk Life	Impaired Risk Disability	Index Annuities	International Insurance	Investments	Jumbo Cases	Life Settlements	Long-Term Care	Section 401(k) Plans	Single Premium Whole Life	Survivorship Life	Tax-Sheltered Annuities/Sect. 403(b)	Term	Universal Life	Variable Annuities	Variable Life	Variable Universal Life	Whole Life
Emmett Insurance Group			•	•		•	•	•			•	•	•	•		•		•		•	•	•	•	•			•	
EPIS Incorporated				•			•					•	•			•							•	•				•
F.P.A., Inc.				•		•	•	•			•	•	•			•	•						•	•				•
Financial Brokerage, Inc.	•		•			•	•	•			•	•	•			•		•		•	•	•	•	•			•	
Financial Independence Network, LLC		•		•	•	•	•	•	•	•		•	•		•	•		•		•	•	•	•	•	•	•	•	•
First American Insurance Underwriters	•		•	•	•	•	•	•			•	•	•	•		•	•	•		•	•	•	•	•	•	•	•	•
Fitzsimmons Brokerage Agency		•	•	•	•	•	•	•	•	•		•	•	•		•	•	•		•	•	•	•	•			•	
Highland Capital Brokerage, an NFP Company				•				•			•	•	•	•		•	•	•		•	•		•	•	•	•	•	•
Independent Brokerage							•						•											•				
Individual Commercial Brokerage, Inc.																		•					•	•				•
Innovative Marketing Strategies			•			•	•				•	•	•								•		•	•				
Insurance Resources Group			•	•	•	•	•	•			•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Insurance Wholesalers	•																						•	•	•	•	•	•
Investors Marketing Services				•		•	•	•			•	•	•			•		•		•	•	•	•	•	•	•	•	•
J. L. Thomas & Co., Inc.			•	•			•				•	•	•			•	•	•		•	•		•	•			•	
J.G. Wentworth							•						•				•											
Joline Associates							•				•		•	•		•		•	•	•	•	•	•	•		•	•	
Kaiser Financial Group, Inc.						•					•		•			•					•	•	•	•			•	
KB Financial Services, Inc.			•		•	•	•	•			•	•	•			•	•	•		•	•	•	•	•			•	
LifePro Financial Services, Inc.	•	•	•		•	•	•	•			•	•	•			•	•	•	•	•	•	•	•	•	•	•	•	•
LTC Partnership, LLC, The																		•										
LTCI Partners																		•										
M&O Marketing							•						•					•		•	•	•	•	•			•	
Marcus Insurance Agency, Inc., The		•	•	•	•	•	•	•			•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Marketing Alliance, The	•	•	•	•	•	•	•	•	•		•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Millennium Brokerage Group, Inc.				•			•				•	•	•			•		•	•	•	•	•	•	•	•	•	•	•
Monroe Brokerage Association, Inc.			•			•	•	•			•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
MultiChoice Marketing Group													•															
MVP Financial Services, Inc.			•	•			•				•	•	•			•	•	•		•	•	•	•	•			•	
National Design & Marketing Group						•	•						•								•		•	•			•	
National Long-Term Care Brokers	•		•	•		•	•	•			•	•	•			•	•	•	•	•	•	•	•	•	•	•	•	•
OC Life Insurance Agency, Inc.																								•	•			
Ohlson Group, Inc., The			•			•	•	•			•	•	•			•	•	•	•	•	•	•	•	•	•	•	•	•
PDI Financial Group			•	•	•	•	•	•	•		•	•	•			•	•	•	•	•	•	•	•	•	•	•	•	•
Petersen International Underwriters	•			•				•						•														
Plus Group, Inc., The			•	•							•	•																
Rampart America, LLC	•		•	•	•	•	•	•			•	•	•			•	•	•	•	•	•	•	•	•	•	•	•	•
Resource Brokerage, LLC	•	•	•	•	•	•	•	•	•	•	•	•	•	•		•		•	•	•	•	•	•	•	•	•	•	•
Revere Financial	•		•	•							•							•										
Risk insurance and reinsurance solutions				•							•																	
Roster Financial, LLC				•			•						•			•	•				•	•	•	•	•	•	•	•
Safe Harbor Financial, Inc.							•						•								•	•	•	•	•	•	•	•
Senior Market Sales, Inc.			•			•	•	•			•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Tough Case Insurance Agency, Inc., The								•			•			•		•					•	•	•	•	•	•	•	•
Transamerica Worksite Marketing	•		•	•	•				•									•						•	•			
Triumph Marketing, LLC							•						•								•	•	•	•	•	•	•	•
Underwriters Marketing Service, Inc.				•	•	•	•	•			•	•	•							•	•	•	•	•	•	•	•	•
Underwriting Specialists, Inc.							•	•	•	•	•	•	•	•							•	•	•	•	•	•	•	•
URL Financial Group	•		•	•	•	•	•	•	•	•	•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Web Insurance Market Strategies			•	•		•	•	•			•	•									•							•
Zenith Marketing Group, Inc.			•	•		•	•	•			•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Advanced Settlements, Inc. 2101 Park Center Dr. Orlando, FL 32835 Marlene Frith 407-296-7373 Fax: 407-296-7377 marlene@advancedsettlements.com National, except MA, MT, VI, Guam, PR	Product illustration software on CD	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs	As needed Marketing materials	Forms available Market support Online application status Product information Quotes available
America's First Financial Corp 2440 Executive Drive, Ste. 207 St. Charles, MO 63303 Tony Anthonis 800-800-6004 Fax: 636-940-9620 tony@4affc.com Most of the U.S.	Company/rate comparisons Product illustration software on CD Sales presentation software Training software	Conference calls Continuing education classes In-house workshops Personal visits	Marketing materials Support staff	Forms available Online application status Product information Quotes available Software to download
AMZ Financial Insurance Services, LLC. 14225 University Ave., Ste 210 Waukee, IA 50263 Allie Miller 866-204-7712 allie@amzwebcenter.com National	Company/rate comparisons Product illustration software on CD Technical support	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	Marketing materials Support staff	Forms available Market support Product information Quotes available Underwriting status
Annuities Exchange 2600 N. Mayfair Rd., Ste. 1190 Milwaukee, WI 53226 John Douglass 800-572-7283 Fax: 414-774-1536 TopRates@AnnuitiesExchange.com National	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support	Continuing education classes Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Underwriting status
Annuity Store, The 1337 Howe Avenue, Ste. 250 Sacramento, CA 95825 Gary E. Adkins 800-825-6094 Fax: 800-439-6819 gary.a@theannuitystore.com National	Product illustration download Sales presentation software Training software	Conference calls Continuing education classes In-house workshops Internet training Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Software to download
Ardan Group, Ltd., The 111 St. Joseph's Terrace Woodbridge, NJ 07095 Paul S. Permison 732-855-0670 Fax: 732-855-0659 paul@ardangroup.com International National	None	Conference calls Personal visits	As needed	
Art Jetter & Company 11305 Chicago Circle Omaha, NE 68154 800-228-0008 Fax: 402-330-5078 art@jetter.com National	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
Ash Brokerage Corp. 7609 W. Jefferson Blvd. Fort Wayne, IN 46804 Alan Bradley 800-589-3000 Fax: 260-478-3610 abradley@ashbrokerage.com National	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software	Conference calls Personal visits Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
Benefit Program Services, Inc. 2444 Morris Avenue Union, NJ 07083 Alan Meyerowitz 908-688-0204 Fax: 908-688-4492 info@bpsinc-online.com CT, DE, NJ, NY, PA	Underwriting status Product illustration download Product illustration software on CD Sales presentation software Technical support	Conference calls Continuing education classes In-house workshops Personal visits Third-party training books, CD-ROMs	As needed Marketing materials Support staff	

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
<p>Blumberg Financial Services, LLC 714 N Bethlehem Pike, Ste. 200 Lower Gwynedd, PA 19002 Alyse N Blumberg, MEd, CLU, ChFC, CLTC, CASL 267-419-1700 Fax: 267-419-1707 alyse@blumbergfinancial.com Mid-Atlantic States CA, CT, DE, FL, MD, NH, NJ, NY, PA, RI, VA</p>	Company/rate comparisons	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
<p>Bogdan and Associates, Inc. P.O. Box 2628 Loves Park, IL 61132 Walt Bogdan 815-639-0003 Fax: 815-639-0004 walt@bogdanins.com AZ, CO, CT, FL, IA, IL, IN, KY, MI, MN, MO, NJ, NV, OH, TN, TX, VA, WI, WV</p>	Company/rate comparisons Product illustration download Product illustration software on CD			Forms available Product information Quotes available Software to download
<p>Brokerage Unlimited, Inc. P.O. Box 419006 St. Louis, MO 63141 Michael Tessler 314-392-2841 Fax: 314-392-2842 mtessler@brokerageunlimited.com National</p>	Company/rate comparisons Product illustration download Sales presentation software Technical support	Conference calls Continuing education classes In-house workshops Internet training Personal visits	As needed Marketing materials Support staff In-house underwriter, LTCI specialist, policy valuation specialist, etc.	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
<p>Brokerage, Inc., The 233 W. Main St. Lewisville, TX 75057 Mike Smith 469-635-6000 Fax: 469-635-6001 mike@thebrokerageinc.com Most of the U.S.</p>	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software We offer personalized web pages with production	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff Web site development	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
<p>Brokers Clearing House, Ltd. 4546 Corporate Drive, Ste. 155 West Des Moines, IA 50266 Mark Hoefler 800-247-5340 Fax: 515-224-5948 mhoefler@bchlfe.com National</p>	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
<p>Brokers International, Ltd. 1200 E. Main Panora, IA 50216 Stephen Grinna 800-362-1097 Fax: 641-755-4201 sgrinna@theimg.net National</p>	Underwriting status Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software	Conference calls In-house workshops Web conferences	Lead program Marketing materials Support staff	Forms available Online application status Product information Quotes available Software to download
<p>Brokers Resource Group 2341 W. White Oaks Dr. Springfield, IL 62704 Chris Beckett 217-787-1001 Fax: 217-787-9933 cbeckett@brgonline.net Most of the U.S.</p>	None Leads program	Conference calls In-house workshops Third-party training books, CD-ROMs Web conferences	Lead program Marketing materials Support staff	Forms available Market support Product information Quotes available Web site development
<p>Champion Agency, Inc. 8801 Horizon Blvd. NE, Ste. 320 Albuquerque, NM 87113 Kenneth Sapon 505-265-8511 x 15 Fax: 505-265-8513 ken@champion-agency.com National</p>	Client management software Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support Training software Custom sales packages	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff Proprietary advanced sales strategies with professional support	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Colonial Brokerage House, Inc. 1000 Jefferson Street, P.O. Box 633 Lynchburg, VA 24505 Cheryl Crouch 434-528-0724 Fax: 434-846-1690 cheryl@colonialbrokeragehouse.com Southeast Mid-Atlantic States	Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff Marketing Campaigns Advanced Sales Support	Forms available Market support Online application status Product information Quotes available Software to download
Creative Marketing International Corporation P.O. Box 25958 Shawnee Mission, KS 25958 Mike Tripses 800-992-2642 Fax: 913-814-0512 mtripses@cmic.net National	Client management software Company/rate comparisons Leads program Product illustration download Technical support Training software	Conference calls Continuing education classes In-house workshops Personal visits Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Product information Quotes available
DAI (Dworkin Associates, Inc.) P.O. Box 2000 Rochester, NH 03866-2000 Gary S. Dworkin, CLU, RHU 800-777-0061 Fax: 603-332-0955 gsd@dworkin.com National	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support	Conference calls Continuing education classes Personal visits Third-party training books, CD-ROMs Web conferences	As needed	Forms available Market support Online application status Product information Quotes available
Davis Life Brokerage 801 Ashworth Road West Des Moines, IA 50265 Trent or Jon Davis 800-747-5612 Fax: 515-222-1666 dlb@DavisLife.com National	Client management software Company/rate comparisons Leads program Product illustration software on CD Sales presentation software	Conference calls In-house workshops Personal visits Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials	Forms available Quotes available
Disability Insurance Services 4444 Zion Avenue, Ste. B San Diego, CA 92120 Daniel C. Steenerson, CLU, ChFC, RHU 800-898-9641 Fax: 619-284-8474 sales@diservices.com National, except VI, Guam, PR	Product illustration software on CD	Conference calls In-house workshops Internet training Personal visits	As needed Marketing materials Support staff	Forms available Market support Online application status Quotes available Underwriting status
DNA Brokerage P.O. Box 65830 West Des Moines, IA 50265 Lori Bochner 800-245-2801 Fax: 515-223-6172 marketing@dnabrokerage.com National	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Training software	Conference calls In-house workshops Internet training Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Product information Quotes available Software to download Underwriting status
ECA Marketing, Inc. 11095 Viking Drive, Ste. 230 Eden Prairie, MN 55344 Marketing 800-356-4189 Fax: 952-941-9686 sharyl@ecamarketing.com National	Company/rate comparisons Leads program Product illustration download Product illustration software on CD	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
ELA Settlement Services, LLC 1435 Morris Ave. Union, NJ 07083-1937 Paul H. Nagelberg 800-388-0103 Fax: 908-810-4159 pnagelberg@execlife.com National	None		As needed Marketing materials Support staff	Forms available Market support Product information
Elite Marketing Group 800 Bering Dr., Ste. 105 Houston, TX 77057-2130 Lisa Ehler 713-507-1030 Fax: 713-507-1090 lehlert@elitemktg.net Most of the U.S.	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support	Conference calls Continuing education classes In-house workshops Personal visits Web conferences	Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
KB Financial Services, Inc. P.O. Box 2430 Lynnwood, WA 98036 John Kistner, CLU, LTCP 800-935-4500 Fax: 425-774-1829 john@kbfinancial.com Northwest AK, IA, OR, WA	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
LifePro Financial Services, Inc. 11452 El Camino Real, Ste. 401 San Diego, CA 92130 Ben Nevejans 888-LifePro Fax: 858-793-5990 ben@lifepro.com National Most of the U.S. Northwest New England Central U.S. Southeast Mid-Atlantic States	Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
LTC Partnership, LLC, The 400 Interpace Parkway - MCC#3 Building C-1st Floor Parsippany, NJ 07054 Michael B. FitzPatrick 973-394-0053 Fax: 973-394-0058 mbfitzpatrick@theltpartnership.com National	Client management software Company/rate comparisons Leads program Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	We customize a business plan/marketing plan with each producer specifically	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
LTCI Partners 1113 S. Milwaukee Ave. Libertyville, IL 60048 National	Product illustration software on CD	Conference calls Continuing education classes Internet training Third-party training books, CD-ROMs Web conferences	Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
M&O Marketing 4000 Town Center, 11th Floor Southfield, MI 48075 Stephanie Murphy 800-228-5964 x249 Fax: 248-784-1428 stephanie@mandomarketing.com National	Client management software Company/rate comparisons Hardware support Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff Customized to each producer	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development Interactive contact management system
Marcus Insurance Agency, Inc., The 389 Boston Post Road Sudbury, MA 01776-3015 Edward J. Fitzwilliam, Jr. (VP of Brokerage) 978-443-4900 Fax: 978-443-9804 edfitzw@comcast.net Most of the U.S.	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
Marketing Alliance, The 111 Westport Plaza, Ste. 1010 St. Louis, MO 63146 Alan Protzel 314-275-8713 Fax: 314-275-8813 aprotzel@themarketingalliance.com National	Client management software Company/rate comparisons Product illustration download Sales presentation software Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download
Millennium Brokerage Group, Inc. 611 Commerce Street, Ste. 2704 Nashville, TN 37203 Kathy Ruskin 615-259-9355 Fax: 615-259-3250 kruskin@mbgnow.com National	Company/rate comparisons Product illustration download Product illustration software on CD Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Emmett Insurance Group 7700 N. Kendall Drive, Ste. 411 Miami, FL 33156 Ethan Emmett 305-270-0999 Fax: 305-804-3886 ethan@emmettinsurance.com National	Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Technical support Training software Interactive web site	Conference calls Continuing education classes In-house workshops Internet training Third-party training books, CD-ROMs Web conferences Seminars in Hotels	As needed Marketing materials Support staff Very "Hands On" with our Producers	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
EPIS Incorporated 11875 Dublin Boulevard, Ste. C-156 Dublin, CA 94568 Steve Walthall 925-556-4040 Fax: 925-556-4050 episleads@aol.com National, except NY	Leads program Product illustration software on CD Technical support	Conference calls Web conferences Complete Program using leads to sell life insurance	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
F.P.A., Inc. 2401 Morris Ave. Union, NJ 07083 Benjamin J. Bishkoff, LUTCF 908-810-4400 Fax: 908-810-4465 ben@fpainsurance.com Mid-Atlantic States	Company/rate comparisons Product illustration software on CD	Continuing education classes In-house workshops	Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
Financial Brokerage, Inc. 2238 South 156 Circle Omaha, NE 68130 Doug Murphy 800-397-9999 Fax: 402-334-6301 dmurphy@fb-inc.com National	Company/rate comparisons Leads program Product illustration software on CD Sales presentation software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
Financial Independence Network, LLC 50 Harrison Street, Ste. 118 Hoboken, NJ 07030 Frank M. Gargano 201-222-8114 Fax: 201-222-8119 fgargano@finlive.com CT, FL, NJ, NY, PA	Client management software Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
First American Insurance Underwriters 189 Reservoir Street Needham, MA 02494 Kenneth Shapiro 781-449-6800 National	Client management software Company/rate comparisons Hardware support Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
Fitzsimmons Brokerage Agency 3633 Hill Road Parsippany, NJ 07054-1001 Michael T. Fitzsimmons, CLU, LTCP 963-299-1511 Fax: 973-299-1660 fitz1511@optonline.net National	None	In-house workshops Personal visits	As needed Marketing materials	Forms available Quotes available Software to download
Highland Capital Brokerage, an NFP Company 20 Commerce Drive Cranford, NJ 07016 Tony Catrini, Vice President Marketing 908-272-8870 Fax: 908-272-2163 tcatrini@highland.com NJ, NY	Company/rate comparisons Product illustration download Sales presentation software	Continuing education classes Study groups	As needed	Forms available Online application status Product information Quotes available Software to download Underwriting status
Independent Brokerage 1 North St Building 818, Ste S-2 Topeka, KS 66619 Tony Compton 800-407-4137 tcompton@ibteam.com National	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Training software	Conference calls Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences Sales training meetings across the United States	As needed Lead program Marketing materials Support staff	Forms available Market support Product information Quotes available Software to download Web site development

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Individual Commercial Brokerage, Inc. 100 Enterprise Drive, Ste. 500 Rockaway, NJ 07866 Aaron Paglia 800-422-0696 Fax: 973-361-0047 aaron.p@ica-icb.com International National, except HI, NE, WI, VI, Guam, PR	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support	Conference calls Continuing education classes Personal visits Web conferences	As needed Marketing materials Support staff	Market support Online application status Product information Quotes available Software to download Underwriting status
Innovative Marketing Strategies 108154 Rancho Bernardo Road, Ste. 380 San Diego, CA 92127 Gary McCarver 858-675-0100 x 24 Fax: 858-675-0110 gary@imsinsurance.net National	Company/rate comparisons Leads program Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences Proprietary CD based training and Sales Systems	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Software to download Web site development
Insurance Resources Group 9744 Wilshire Blvd., #306 Beverly Hills, CA 90212 Mehrdad Taghdiri 888-224-4777 Fax: 310-550-3390 sales@irginsurance.com National	Company/rate comparisons Product illustration download Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Product information Quotes available Software to download Underwriting status Web site development
Insurance Wholesalers 6939 Sunrise Blvd., Ste. 107 Citrus Heights, CA 95610 Ty Rutz 916-723-8292 support@insurancewholesalers.com National	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software	Conference calls Internet training	Marketing materials Support staff	Forms available Market support Product information Quotes available Software to download
Investors Marketing Services 168 Centre Street Danvers, MA 01923 Marketing Department 800-462-2551 Fax: 978-774-4249 salesinfo@investorsmarketing.com National, except AL, VI, Guam, PR	Company/rate comparisons Hardware support Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support	Continuing education classes Internet training Web conferences	As needed Lead program Marketing materials Support staff Customized direct mail pieces	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
J. L. Thomas & Co., Inc. 1500 Chester Avenue Cleveland, OH 44114 Mike Thomas, CLU 216-241-2300 x 28 Fax: 216-241-5070 mike@jlthomasco.com AZ, FL, GA, IN, KY, MI, MN, MO, NC, NY, OH, PA, VA, WI, WV	Company/rate comparisons Product illustration download Product illustration software on CD Technical support	Continuing education classes In-house workshops Personal visits Third-party training books, CD-ROMs	As needed Marketing materials Support staff	Forms available Product information Quotes available Software to download
J.G. Wentworth 40 Morris Ave. Bryn Mawr, PA 19010 800-535-0195 Fax: 800-535-7108 info@jgwannuities.com National Most of the U.S.	Leads program Product illustration download Technical support	Conference calls In-house workshops Internet training Personal visits Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Product information Quotes available
Joline Associates 1040 Broad Street Shrewsbury, NJ 07702 Pat Joline, CLU, ChFC 800-203-2797 Fax: 732-542-9600 joline@exit109.com National	Company/rate comparisons Product illustration download Product illustration software on CD Technical support	Conference calls Continuing education classes In-house workshops Personal visits	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
Kaiser Financial Group, Inc. 141 South Ave, Ste. 206 Fanwood, NJ 07023 908-322-8868 Fax: 908-322-8951 info@kaiserfinancial.com National	Company/rate comparisons Product illustration software on CD	Conference calls Personal visits	As needed	Forms available Product information Quotes available Software to download

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
<p>Monroe Brokerage Association Inc. 151 Fries Mill Road, Ste. 504 A Turnersville, NJ 08012 Gemma Aquilino, Agency Manager 800-492-4622 Fax: 856-290-4627 Gemma@MonroeBrokerage.com National</p>	<p>Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software</p>	<p>Conference calls Continuing education classes In-house workshops Personal visits Study groups Third-party training books, CD-ROMs</p>	<p>As needed Lead program Marketing materials Support staff</p>	<p>Forms available Market support Online application status Product information Quotes available Software to download Underwriting status</p>
<p>MultiChoice Marketing Group 1210 E. Main Panora, IA 50216 Liz Osen 877-287-3644 Fax: 641-755-4325 losen@theimg.net National, except NY</p>	<p>None</p>	<p>Conference calls Web conferences</p>	<p>Marketing materials Support staff</p>	<p>Forms available Online application status Product information</p>
<p>MVP Financial Services, Inc. 8030 Excelsior Drive, Ste 301 Madison, WI 53717 Dawn B. Nelson, CLU, ChFC - Chief Marketing Officer 888-774-4687 Fax: 608-827-9007 dnelson@mvp4me.com Most of the U.S.</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software</p>	<p>Conference calls Continuing education classes In-house workshops Personal visits Study groups Third-party training books, CD-ROMs Web conferences</p>	<p>Marketing materials Support staff</p>	<p>Forms available Market support Product information Quotes available Software to download Underwriting status</p>
<p>National Design & Marketing Group 8800 N Gainey Center Drive, Suite 250 Scottsdale, AZ 85258 Rona Guymon 800-833-7427 Fax: 480-607-1048 rona@ndmgnet.com Most of the U.S.</p>	<p>Company/rate comparisons Leads program Product illustration software on CD</p>	<p>Conference calls In-house workshops Internet training Web conferences</p>	<p>Lead program Marketing materials Support staff</p>	<p>Forms available Product information</p>
<p>National Long-Term Care Brokers 11 Halfmoon Executive Park Clifton Park, NY 12065 Bob Vandy, CLU, ChFC, LUTCF, CSA, CLTC 800-695-8224 x 105 Fax: 518-371-6131 bvandy@nyltcb.com National</p>	<p>Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software</p>	<p>Conference calls Continuing education classes In-house workshops Personal visits Third-party training books, CD-ROMs Web conferences</p>	<p>As needed Lead program Marketing materials Support staff</p>	<p>Forms available Market support Online application status Product information Quotes available Software to download Underwriting status</p>
<p>OC Life Insurance Agency, Inc. P.O. Box 3545 Mission Viejo, CA 92690 Dan Love 800-564-3309 Fax: 949-709-0582 Info@OCLifeInsurance.com National, except NY</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support Training software</p>	<p>Conference calls Personal visits</p>	<p>As needed Marketing materials Support staff</p>	<p>Forms available Market support Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Ohlson Group, Inc., The 510 E. 96th Street, #185 Indianapolis, IN 46240 Nick Ohlson 317-844-4411 Fax: 317-844-4422 tgearlds@ohlsongroup.com National</p>	<p>Client management software Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences</p>	<p>As needed Lead program Marketing materials Support staff</p>	<p>Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development</p>
<p>PDI Financial Group 601 N. Lyndale Drive Appleton, WI 54914 John Hanson 800-234-7341 Fax: 920-739-2303 John@pdifinancial.com Most of the U.S.</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences</p>	<p>As needed Marketing materials Support staff</p>	<p>Forms available Market support Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Petersen International Underwriters 23929 Valencia Boulevard, Ste. 215 Valencia, CA 91355 Thomas R. Petersen 800-345-8816 Fax: 661-254-0604 PIU@piu.org International National</p>	<p>None</p>	<p>Conference calls Continuing education classes In-house workshops Personal visits</p>	<p>Marketing materials</p>	<p>Forms available Market support Product information Quotes available Underwriting status</p>

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Plus Group, Inc., The 235 E. Colorado Blvd., #1386 Pasadena, CA 91101 Tracey O'Malley 818-557-0642 Fax: 818-557-0742 tracey@plusgroupca.com National	None	Conference calls Continuing education classes Personal visits	As needed	Forms available Market support Online application status Quotes available Underwriting status
Rampart America, LLC One Parker Plaza P.O. Box 1321 Fort Lee, NJ 07024 International National	Client management software Company/rate comparisons Product illustration download Technical support	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CD-ROMs Web conferences	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status
Resource Brokerage, LLC 1501 E. Woodfield Road, Ste. 110E Schaumburg, IL 60173 Michael Walls 800-605-7566 Fax: 847-619-9592 info@resourcebrokerage.com National	Client management software Company/rate comparisons Hardware support Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status In-house Graphics Design Web site development Free E-commerce Web sites
Revere Financial 4 Oak Hollow Dr., Ste. 101 Voorhees, NJ 08043 Thomas DiCinti, RHU 856-770-8220 Fax: 856-770-8225 t.dicinti@comcast.net National	Company/rate comparisons Product illustration download Product illustration software on CD Technical support	Conference calls In-house workshops Personal visits	As needed Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Underwriting status
Risk Insurance and reinsurance solutions 1208 West Newport Center Drive, Ste. 202 Deerfield Beach, FL 33442 John Hamilton 954-943-3141 Fax: 954-421-4185 John.Hamilton@riskw.com National, except AL, ME, MT, NY, SC, VT, Guam, PR	Product illustration download Product illustration software on CD		As needed Marketing materials Support staff	Forms available Product information Software to download
Roster Financial LLC 1000 Voorhees Drive Voorhees, NJ 08043 Angel Fields 800-933-6632 ext. 1175 angelfields@rosterfinancial.com National	Company/rate comparisons Hardware support Leads program Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Underwriting status
Safe Harbor Financial, Inc. 2200 Ben Franklin Parkway, 105N Philadelphia, PA 19130 Tricia Rodio 215-568-6377 Fax: 215-564-0155 trodio@safeharborfinancial.com National, except AL, VI, Guam, PR	Company/rate comparisons Leads program	Conference calls Personal visits Third-party training books, CD-ROMs Web conferences	Lead program Marketing materials Support staff	Forms available Market support Product information Quotes available Web site development
Senior Market Sales, Inc. 8420 West Dodge Road, 5th Floor Omaha, NE 68114-3446 James F. Summers 402-397-3311 Fax: 402-397-0455 jfms@seniormarketsales.com National	Client management software Company/rate comparisons Leads program Product illustration download Product illustration software on CD Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Web conferences	As needed Lead program Marketing materials Support staff Internet Marketing	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development

Brokerage General Agencies and Other Wholesalers

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Tough Case Insurance Agency, Inc., The P.O. Box 844 Needham, MA 02494 Rudy Rudner 800-285-4777 Fax: 781-449-4586 toughcase@comcast.net International National	Company/rate comparisons	Conference calls	As needed Marketing materials	Forms available Quotes available
Transamerica Worksite Marketing 1400 Centerview Drive Little Rock, AR 72211 Joe Childers 501-227-1172 Fax: 501-227-1489 jwchilders@aegonusa.com National	Product illustration download Product illustration software on CD Sales presentation software	Continuing education classes In-house workshops Internet training Personal visits	As needed Marketing materials Support staff	Forms available Market support Product information Quotes available Software to download
Triumph Marketing, LLC 4411 E. Kentucky Avenue Glendale, CO 80246 Marketing ext. 1 800-339-0208 marketing@triumphmktg.com National	Company/rate comparisons Leads program Product history and forecasting Illustration software	Conference calls Internet training Personal visits Web conferences On demand training at your fingertips	Lead program Marketing materials Support staff Appointment setters	Forms available Market support Online application status Product information Quotes available Underwriting status Web site development Archived on demand training and conference calls
Underwriters Marketing Service, Inc. 100 Century Parkway, Ste. 350 Mount Laurel, NJ 08054 Trudy Kulikowski 800-524-1774 Fax: 856-727-0600 info@callums.com AL, AR, AZ, CA, CO, CT, DE, FL, GA, IL, MA, MD, ME, NC, ND, NH, NJ, NY, OH, PA, RI, SC, SD, TX, VA, VT, WV	Company/rate comparisons Leads program Product illustration download Product illustration software on CD Sales presentation software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	As needed Lead program Marketing materials Support staff	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development
Underwriting Specialists, Inc. P.O. Box 409 Fort Washington, PA 19034-0409 Robert W. Pickard 215-540-4470 Fax: 215-540-4471 RPickard@undspeg.com National	Company/rate comparisons Product illustration download Product illustration software on CD Technical support	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences Product seminars	As needed Marketing materials	Forms available Online application status Product information Quotes available Software to download Underwriting status
URL Financial Group 5320 Jaycee Avenue Harrisburg, PA 17112 Ken Clemens 800-926-8875 Fax: 717-540-5628 kenc@urlfinancial.com National	Company/rate comparisons Hardware support Leads program Product illustration download Product illustration software on CD Sales presentation software Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CD-ROMs Web conferences	Lead program Marketing materials Support staff Annual Sales Convention	Forms available Market support Online application status Product information Quotes available Software to download Underwriting status Web site development Archived online training meetings
Web Insurance Market Strategies 1400 Village Square Blvd, #3-330 Tallahassee, FL 32312 Keith Ouellette 850-894-2821 Fax: 954-697-2709 keitho@webins.com Most of the U.S. AR, AZ, CA, CO, CT, DE, FL, GA, IL, IN, KS, KY, LA, MA, MD, MI, MN, MO, NC, NJ, OH, OK, OR, PA, RI, SC, TN, TX, VA, WA, WI	Client management software Product illustration download Product illustration software on CD Sales presentation software Training software	Conference calls Internet training Web conferences	Lead program Marketing materials	Forms available Market support Online application status Product information Quotes available Software to download Web site development
Zenith Marketing Group, Inc. 303 West Main Street, Ste. 200 Freehold, NJ 07728 Mike Gorlick 800-733-0054 x 114 Fax: 732-577-6205 mgorlick@zenithmarketing.com National	Company/rate comparisons Product illustration download Sales presentation software Technical support	Conference calls Continuing education classes In-house workshops Internet training Personal visits Web conferences	As needed Marketing materials Support staff	Forms available Online application status Product information Quotes available Software to download Underwriting status Online carrier contracting

