

A Producer's Guide to

Brokerage General Agencies And Other Wholesalers 2009



Welcome to LIFE INSURANCE SELLING's 12th annual "A Producer's Guide to Brokerage General Agencies and Other Wholesalers." This guide includes alphabetical listings for 72 brokerage general agencies (BGAs) and other wholesalers throughout the United States. We also present an easy reference chart (p. 52-53) 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. You can find that information pages 54-68. 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 on our Web site, www.lifeinsuranceselling.com. 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 existing business, or move into more advanced markets, we hope this guide will serve as a useful resource.

-The Editors

Companies

	Accident Insurance	Cafeteria Plans/Section 125	Critical Illness	Disability Income Insurance	Employee Benefits	Final Expense Plans	Fixed Annuities	Health Savings Accounts	Impaired Risk Life	Impaired Risk Disability	Indexed Annuities	Individual Health/Medical Plans	International Insurance	Investments	Jumbo Cases	Life Settlements	Long-Term Care	Section 401(k) Plans	Single Premium Whole Life	Survivorship Life	Tax-Sheltered Annuities/Section 403(b) Term	Term	Universal Life	Variable Annuities	Variable Life	Variable Universal Life	Whole Life
ACS/ Paradigm Insurance Marketing			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
AIP Group, The			•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
American Ins. Marketing Services, Inc.						•											•										
American Retirement Systems							•					•															•
America's First Financial Corporation			•	•		•	•	•			•				•		•	•	•	•	•		•			•	•
AMZ Financial Insurance Services, LLC						•	•				•					•	•										•
ANBC						•	•				•											•					•
Annuities Exchange							•				•										•						
Art Jetter & Company	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Ash Brokerage Corporation				•			•		•	•	•	•	•		•		•	•	•	•	•	•	•	•	•	•	•
Benefit Program Services, Inc.				•		•	•	•	•	•	•	•	•		•		•	•	•	•	•	•	•	•	•	•	•
Blumberg Financial Services, LLC			•	•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Bogdan and Associates, Inc.							•				•				•		•	•	•	•	•		•			•	•
Borden Hamman Agency			•	•		•	•	•	•	•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Brokerage Inc., The	•		•	•	•	•	•	•	•	•	•	•	•		•		•	•	•	•	•	•	•	•	•	•	•
Brokerage Solutions, Inc.				•	•					•							•										
Brokerage Unlimited, Inc.							•		•						•		•	•	•	•	•	•	•	•	•	•	•
Brokers Clearing House, Ltd.			•	•		•	•	•	•	•	•	•	•		•	•	•	•	•	•	•	•	•	•	•	•	•
Brokers International, Ltd.							•										•						•			•	•
Calkins Kramer Insurance Inc.	•		•		•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•

Companies

	Accident Insurance	Cafeteria Plans/Section 125	Critical Illness	Disability Income Insurance	Employee Benefits	Final Expense Plans	Fixed Annuities	Health Savings Accounts	Impaired Risk Life	Impaired Risk Disability	Indexed Annuities	Individual Health/Medical Plans	International Insurance	Investments	Jumbo Cases	Life Settlements	Long-Term Care	Section 401(k) Plans	Single Premium Whole Life	Survivorship Life	Tax-Sheltered Annuities/Section 403(b) Term	Term	Universal Life	Variable Annuities	Variable Life	Variable Universal Life	Whole Life	
Champion Agency, Inc.																												
Colonial Brokerage House, Inc.																												
Cornerstone Ins. & Financial Services, Inc.																												
CPI Companies																												
Creative Marketing																												
Crump Life Insurance Services																												
Custom Benefit Plans																												
DAI (Dworkin Associates, Inc.)																												
Dallas Financial Wholesalers																												
Davis Life Brokerage																												
Disability Insurance Services																												
Dunhill Marketing & Ins. Services, Inc.																												
ECA Marketing, Inc.																												
ELA Settlement Services, LLC																												
Emmett Insurance Group																												
Eugene Cohen Insurance Agency, Inc.																												
Exceptional Risk Advisors, LLC																												
F.P.A., Inc.																												
Fairlane Financial Corp.																												
Final Expense Brokerage																												
Financial Brokerage, Inc.																												
First American Insurance Underwriters																												
Fitzsimmons Brokerage Agency																												
Global Insurance Resources Group																												
Gorilla Insurance Marketing, Inc.																												
Highland Capital Brokerage																												
Hutchens Brokerage Group, Inc.																												
Ideal Producers Group																												
Insurance Wholesalers, Inc.																												
J. L. Thomas & Co., Inc.																												
Joline Associates																												
LifePro Financial Services, Inc.																												
LifeStyle Insurance Services, Inc.																												
LTCI Partners, LLC																												
M2 Settlements																												
Marcus Insurance Agency, Inc., The																												
Marketing Alliance, Inc., The																												
National College Funding Strategies, Inc.																												
National Long-Term Care Brokers																												
OC Life Insurance Agency, Inc.																												
Ohlson Group, Inc., The																												
Partners Advantage Ins. Services, LLC																												
Petersen International Underwriters																												
PIPAC Life																												
Resource Brokerage, LLC																												
Safe Harbor Financial, Inc.																												
Secured Financial Solutions, LLC																												
Tomorrow's Financial Services																												
Underwriters Marketing Service Inc.																												
Underwriting Specialists, Inc.																												
Wholehan Marketing Associates																												
Zenith Marketing Group, Inc.																												

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Hardware and Software Support

Training Support

Marketing Support

Internet Support

<p>ACS/Paradigm Ins. Marketing 16601 Ventura Blvd., #307 Encino, CA 91436-1921 Paul D. Kaplan, CLU 818-380-0034 Fax: 818-380-0203 paul@paradigmmins.com All states</p>	<p>Company/rate comparisons Product illustration download</p>	<p>Conference calls In-house workshops Personal visits</p>	<p>As needed Marketing materials</p>	<p>Forms available Marketing tools Product information Quotes available</p>
<p>AIP Group, The 2041 E. Square Lake Rd., Ste.100 Troy, MI 48085-3897 Broker Consultant 800-783-5206, press 1 Fax: 248-828-3456 bc@aiponline.net All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Online application status Product information Quotes available Software to download Underwriting status</p>
<p>American Insurance Marketing Services, Inc. 101 TechnaCenter Dr. Montgomery, AL 36117 Mike Lockwood 800-325-9876 Fax: 334-272-4409 mlockwood@aimsltc.com Most of the U.S.</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Technical support Training software</p>	<p>Conference calls Internet training Web conferences</p>	<p>Marketing materials Staff support for case sales</p>	<p>Forms available Online application status Product information Quotes available Software to download Underwriting status</p>
<p>American Retirement Systems 5700 University Avenue, Ste. 250 West Des Moines, IA 50266 Mitchell Whitney 888-969-7384 Fax: 515-224-6849 mitch.whitney@americanretirementsystems.com All states except NY</p>	<p>Product illustration download Product illustration software on CD Sales presentation software</p>	<p>Conference calls In-house workshops Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Marketing tools Product information</p>
<p>America's First Financial Corporation 2046 Queens Brooke Blvd., Ste. 200 St. Peters, MO 63376 Julie Stratton 800-800-6004 Fax: 636-940-9620 julie@4affc.com Most of the U.S.</p>	<p>Company/rate comparisons Product illustration download</p>	<p>Conference calls In-house workshops Web conferences</p>	<p>Marketing materials Staff support for case sales</p>	<p>Forms available Product information Quotes available</p>
<p>AMZ Financial Insurance Services, LLC 14225 University Ave., Ste. 210 Waukee, IA 50263 Allie Miller 866-204-7712 allie@amzwebcenter.com All states</p>	<p>Product illustration download Product illustration software on CD</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Web conferences</p>	<p>Lead generation program Marketing materials Staff support for case sales</p>	<p>Forms available Marketing tools Product information Quotes available Software to download</p>
<p>ANBC 1333 El Camino Pekin, IL 61554 Paul J. Cross 800-228-2926 Fax: 309-346-4890 anbc@anbc.com All states except NY</p>	<p>Client management software Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences Training and mentoring for your own annuity selling Webinars</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Underwriting status</p>
<p>Annuities Exchange P.O. Box 26498 Milwaukee, WI 53226 John Douglass 800-572-7283 Fax: 414-774-1536 TopRates@AnnuitiesExchange.com All states</p>	<p>Product illustration download Sales presentation software</p>	<p>Continuing education classes Internet training</p>	<p>Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Marketing tools Product information</p>
<p>Art Jetter & Company 11305 Chicago Circle Omaha, NE 68154 International All states</p>	<p>Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Technical support Training software</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>

Companies

Hardware and Software Support

Training Support

Marketing Support

Internet Support

<p>Ash Brokerage Corporation 7609 West Jefferson Boulevard Fort Wayne, IN 46804 Craig Klenk 800-589-3000, ext. 0702 Fax: 260-479-6092 CKlenk@ashbrokerage.com All states</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 Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>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, FL, NJ, NY, PA, DC</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD</p>	<p>In-house workshops Personal visits</p>	<p>Marketing materials Staff support for case sales</p>	<p>Forms available Marketing tools Product information Quotes available</p>
<p>Blumberg Financial Services, LLC 714 N. Bethlehem Pike, Ste. 200 Lower Gwynedd, PA 19002 Alyse N. Blumberg, MEd, CLU, ChFC, CASL, CLTC 267-419-1700 Fax: 267-267-1707 alyse@blumbergfinancial.com Most of the U.S.</p>	<p>Client management software 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 Third-party training books, CDs</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Bogdan and Associates, Inc. P.O. Box 2628 Loves Park, IL 61132 Walt Bogdan 800-225-2286 Fax: 815-639-0004 Walt@BogdanIns.com AZ, CO, CT, FL, IA, IL, IN, KY, MD, MI, MN, MO, NJ, NV, OH, TX, VA, WI, WV</p>	<p>Company/rate comparisons Product illustration download</p>		<p>Marketing materials</p>	<p>Forms available Marketing tools Product information Quotes available</p>
<p>Borden Hamman Agency 9868 Plano Road Dallas, TX 75238 Christi Daughenbaugh, CLTC 214-349-4911 Fax: 214-343-3999 cmdaughenbaugh@bordenhamman.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Brokerage Inc., The 233 West Main Street Lewisville, TX 75057 Chris Renfro 469-635-6000 Fax: 469-635-6001 Chris@TheBrokerageInc.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Brokerage Solutions, Inc. 3979 Park Towne CT NE Cedar Rapids, IA 52402 Tom Petsche, Sr., CLU, ChFC, RHU 319-393-9410 Fax: 319-393-9606 ditlp@aol.com All states except NY</p>	<p>Product illustration download Sales presentation software</p>	<p>Conference calls Personal visits</p>	<p>As needed Marketing materials Staff support for case sales Joint selling appointments</p>	<p>Forms available Marketing tools Product information Quotes available Underwriting status</p>
<p>Brokerage Unlimited, Inc. P.O. Box 419006 St. Louis, MO 63141 Michael Tessler 314-392-2841 Fax: 314-392-2842 mtessler@brokerageunlimited.com Most of the U.S.</p>	<p>Company/rate comparisons Product illustration download Technical support A variety of options at www.brokerageunlimited.com</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Underwriting status</p>
<p>Brokers Clearing House, Ltd. 4546 Corporate Drive, Ste. 155 West Des Moines, IA 50266 Debbie Hannam 515-223-9479 Fax: 515-224-5948 dhannam@bchlife.com All states except AK, VI, Guam, PR</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs Sales Concepts Seminars</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Brokers International, Ltd. 1200 E Main Street Panora, IA 50216 Steve Grinna 800-362-1097 Fax: 641-755-4201 sgrinna@bilttd.com All states except AK, Guam, PR</p>	<p>None</p>	<p>In-house workshops</p>		<p>Marketing tools Product information</p>

Companies

Hardware and Software Support

Training Support

Marketing Support

Internet Support

<p>Calkins Kramer Insurance Inc. 10261 4th Street North St. Petersburg, FL 33716 Kyle V. Calkins 727-577-9610 Fax: 727-577-9610 kvc@calkinskramer.com All states</p>	<p>Company/rate comparisons Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Internet training Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Product information Quotes available Software to download</p>
<p>Champion Agency, Inc. 8801 Horizon Blvd., N.E. Ste. 320 Albuquerque, NM 87113 Kenneth Sapon 505-265-8511, ext. 106 Fax: 505-265-8513 ken@champion-agency.com All states</p>	<p>Client management software Company/rate comparisons Hardware support 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, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Staff support for case sales Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Colonial Brokerage House, Inc. 1000 Jefferson Street Lynchburg, VA 24505 Regina Dolan-Sewell 434-528-0724 Fax: 434-846-1690 gina@colonialbrokeragehouse.com Mid-Atlantic States — DE, FL, GA, KY, MD, MN, NC, NY, PA, SC, TN, VA, WV, DC</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 Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available</p>
<p>Cornerstone Insurance and Financial Services, Inc. P.O. Box 381625 Birmingham, AL 35238 Rick Radford 800-345-2133 Fax: 205-980-7422 Rick@CornerstoneIns.com Most of the U.S.</p>	<p>Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Technical support Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>CPI Companies 513 Centennial Blvd. Voorhees, NJ 08043 Mike McKee 856-874-1250 Fax: 856-874-1255 mckee@cpicompanies.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls In-house workshops Personal visits</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Product information</p>
<p>Creative Marketing 11460 Tomahawk Creek Parkway Leawood, KS 66211 Merrit Strunk 800-992-2642 Fax: 913-814-0512 getcreative@creativemarketing.net All states, PR</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Technical support Training software</p>	<p>Conference calls In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Crump Life Insurance Services 105 Eisenhower Parkway Roseland, NJ 07068 Sherri K. Lindenberg 973-461-2153 Fax: 717-703-4704 sherri.lindenberg@crump.com All states</p>	<p>Company/rate comparisons Product illustration download Sales presentation software Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Web conferences</p>	<p>Marketing materials Staff support for case sales</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status Advanced sales materials Sales ideas,</p>
<p>Custom Benefit Plans 616 Easton Road, P.O. Box 499 Willow Grove, PA 19090-0499 Greg DuPlessis 866-422-9188, ext. 222 Fax: 215-659-4708 greg@custombenefitplans.com All states</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 Third-party training books, CDs Web conferences</p>	<p>Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available</p>
<p>DAI (Dworkin Associates, Inc.) 22 South Main Street Rochester, NH 03867 Gary S. Dworkin, CLU, RHU 800-777-0061 Fax: 603-332-0955 gsd@Dworkin.com All states</p>	<p>Company/rate comparisons Product illustration download</p>	<p>Conference calls Continuing education classes Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Dallas Financial Wholesalers 7512 San Jacinto Place, Ste. 100 Plano, TX 75024 Ronald G Hogsett 800-746-8397 Fax: 972-788-0634 rhogsett@ronrawlings.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software</p>	<p>Conference calls Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Product information Quotes available</p>

Companies

Hardware and Software Support

Training Support

Marketing Support

Internet Support

<p>Davis Life Brokerage 801 Ashworth Road West Des Moines, IA 50265 Trent A. Davis 800-747-5612 Fax: 515-222-1666 dlb@DavisLife.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software</p>	<p>Conference calls In-house workshops Internet training Personal visits Web conferences</p>	<p>As needed</p>	<p>Forms available Product information Quotes available</p>
<p>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 All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Web conferences</p>	<p>As needed Marketing materials</p>	<p>Forms available Marketing tools Product information Quotes available Underwriting status</p>
<p>Dunhill Marketing & Insurance Services, Inc. 2341 5th Avenue San Diego, CA 92101 Tony Steigerwald 619-578-7800, ext. 113 Fax: 619-578-7819 tonys@dunhillinsurance.com International All states</p>	<p>Client management software 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 Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Online application status Product information Quotes available Software to download Underwriting status</p>
<p>ECA Marketing, Inc. 11095 Viking Drive Eden Prairie, MN 55344 Sharyl Schultz 952-941-9710 Fax: 952-229-8343 sharyl@ecamarketing.com All states</p>	<p>Company/rate comparisons Product illustration download</p>	<p>Conference calls Continuing education classes Web conferences</p>	<p>Lead generation program Marketing materials Staff support for case sales</p>	<p>Forms available Online application status Product information Quotes available Software to download</p>
<p>ELA Settlement Services, LLC 1435 Morris Ave Union, NJ 07083 Paul H. Nagelberg 800-388-0103 Fax: 908-810-4159 pnagelberg@execlife.com Most of the U.S. except AK, KY, MT, ND, NV, OK, WV, VI, Guam, PR</p>	<p>None</p>	<p>Conference calls Personal visits</p>	<p>Marketing materials</p>	<p>Forms available Marketing tools Product information</p>
<p>Emmett Insurance Group 7700 N. Kendall Drive Miami, FL 33156 Ethan C. Emmett 305-270-0999 Fax: 305-270-0093 eig@bellsouth.net AL, AR, AZ, CA, CO, CT, FL, GA, IL, IN, LA, MA, MD, ME, MI, MO, NC, NJ, NV, NY, OH, PA, SC, TX, VA, WA</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Web conferences</p>	<p>Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Eugene Cohen Insurance Agency, Inc. 9933 Lawler, Ste. 140 Skokie, IL 60077 Michael Cohen 800-333-4340 nate@cohenagency.net Most of the U.S.</p>	<p>Immense selection of company i illustration, concept, and marketing software.</p>	<p>Conference calls In-house workshops Internet training Personal visits Study groups Web conferences</p>	<p>As needed Marketing materials Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Exceptional Risk Advisors, LLC 1 International Blvd., Ste. 625 Mahwah, NJ 07495 Sean McNiff 201-252-4717 Fax: 201-512-0221 sean.mcniff@exceptionalriskadvisors.com All states</p>	<p>None</p>	<p>Conference calls Continuing education classes Personal visits</p>	<p>As needed Marketing materials Staff support for marketing programs</p>	<p>Product information</p>
<p>F.P.A., Inc. 2401 Morris Ave. Union, NJ 07083 Benjamin J. Bishkoff, LUTCF 908-810-4400 Fax: 908-810-4465 ben@fpainsurance.com Most of the U.S.</p>	<p>Company/rate comparisons Product illustration download Sales presentation software</p>	<p>Continuing education classes In-house workshops</p>	<p>Marketing materials Staff support for case sales</p>	<p>Forms available Product information Quotes available Software to download Underwriting status</p>
<p>Fairlane Financial Corp. 1200 South Pine Island Rd., Ste. 100 Fort Lauderdale, FL 33324 Ron Lane 800-327-1460 Fax: 954-476-0051 Rdlane@888Fairlane.com All states</p>	<p>Product illustration download Product illustration software on CD Technical support</p>	<p>In-house workshops Web conferences</p>	<p>As needed Marketing materials Staff support for case sales</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download</p>

Companies

Hardware and Software Support

Training Support

Marketing Support

Internet Support

<p>Final Expense Brokerage 4801 Dressler Rd. N.W., Ste. 180 Canton, OH 44718 Rob Swanson 888-318-4498 Fax: 330-493-0715 FEBrokerage@aol.com All states except NY</p>	<p>Product illustration download Product illustration software on CD</p>		<p>As needed</p>	<p>Forms available Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Financial Brokerage, Inc. 2238 South 156th Circle Omaha, NE 68130 Bruce Dicks, CLU, ChFC, FLMI/M 800-397-9999 Fax: 402-334-6301 bdicks@fb-inc.com All states except VI, Guam, PR</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Software for lead generation</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>Lead generation program Marketing materials Supplied leads Staff support for case sales</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>First American Insurance Underwriters 460 Hillside Avenue Needham, MA 02494 Kenneth Shapiro 781-449-6800 Fax: 781-449-7694 kshapiro@faiu.com All states</p>	<p>Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Technical support Training software</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Fitzsimmons Brokerage Agency 3633 Hill Road Parsippany, NJ 07054-1001 Michael T. Fitzsimmons, CLU, LTCP 973-299-1511 Fax: 973-299-1660 fitz1511@optonline.net CA, CO, DE, FL, GA, IL, KS, MD, NJ, NY, OH, PA, VT, WA, WV</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software</p>	<p>Conference calls Personal visits</p>	<p>As needed Marketing materials Staff support for case sales</p>	<p>Forms available Product information Quotes available Software to download</p>
<p>Global Insurance Resources Group 9744 Wilshire Blvd., #306 Beverly Hills, CA 90212 Mehrdad Taghdiri, CFP 310-550-3300 Fax: 310-550-3390 sales@irginsurance.com International All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Product information Quotes available Software to download</p>
<p>Gorilla Insurance Marketing, Inc. 185 NE Dartmoor Dr. Waukee, IA 50263 Dina Privitera 866-886-6387 Fax: 515-987-3728 dprivitera@gorillainsurancemarketing.com All states</p>	<p>Client management software Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Product information Quotes available Software to download</p>
<p>Highland Capital Brokerage 20 Commerce Dr., Ste. 150 Cranford, NJ 07016 Tony Catrini, VP Marketing 908-272-8870 Fax: 908-272-2163 tcatrini@highland.com NJ, NY</p>	<p>Company/rate comparisons Product illustration download Sales presentation software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Web conferences</p>	<p>As needed Marketing materials Staff support for case sales</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Underwriting status</p>
<p>Hutchens Brokerage Group, Inc. 2002 N. Lois Avenue, Ste. 270 Tampa, FL 33607 George Hutchens, CLU, ChFC 813-414-9200 or 800-752-3235 Fax: 813-414-0500 george@hutchensbrokerage.com Southeast</p>	<p>Company/rate comparisons Product illustration download Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Web conferences</p>	<p>Marketing materials Staff support for case sales</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
Ideal Producers Group 7400 College Blvd., Ste. 205 Overland Park, KS 66210 Robb Edwards 888-433-2507 Fax: 913-6470627 redwards@idealpg.com All states except NY	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software	Conference calls In-house workshops Internet training Personal visits Web conferences	As needed Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs Web site development	Marketing tools Product information
Insurance Wholesalers, Inc. 6939 Sunrise Blvd., Ste. 107 Citrus Heights, CA 95610 Natasha Price 800-689-5490 Fax: 916-723-8770 nprice@insurancewholesalers.com All states	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software	Conference calls In-house workshops Internet training	Lead generation program Marketing materials Staff support for case sales	Forms available Marketing tools Product information Quotes available Software to download
J. L. Thomas & Co., Inc. 1500 Chester Avenue Cleveland, OH 44114 J. Michael Thomas, CLU 216-241-2300 Fax: 216-241-5070 mike@jlthomasco.com AZ, CA, FL, GA, HI, IN, KY, MN, MO, MT, NC, NY, OH, PA, SC, TX, VA, WA, WI, DC	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, CDs	As needed Marketing materials	Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status
Joline Associates 1040 Broad Street, Ste. 101 Shrewsbury, NJ 07702 Pat Joline 800-203-2797 Fax: 732-542-3510 joline@exit109.com All states	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support	Conference calls Continuing education classes In-house workshops Personal visits Study groups	As needed Marketing materials Staff support for case sales Staff support for marketing programs	Forms available Marketing tools Online application status Product information Quotes available Underwriting status
LifePro Financial Services, Inc. 11452 El Camino Real San Diego, CA 92130 Lara Finley 888-543-3776 lara@lifepro.com All states	Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Technical support Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences	Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs Web site development	Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status Client management software
LifeStyle Insurance Services, Inc. 30448 Rancho Viejo Rd., Ste. 250 San Juan Capistrano, CA 92675 Carol Gardner 949-272-2260 cgardner@lifestyleinsurance.com All states	Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software	Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CDs Web conferences	As needed Marketing materials Staff support for case sales Staff support for marketing programs	Marketing tools Product information Quotes available
LTCI Partners, LLC 100 Field Drive, Ste. 140 Lake Forest, IL 60045 Patrick Bradley, CLU, ChFC 800-245-8108 Fax: 847-680-9112 info@ltcipartners.com All states	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, CDs Web conferences	Marketing materials Staff support for case sales Staff support for marketing programs Web site development	Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status Video training libraries,
M2 Settlements 5009 Medalist Court Oceanside, CA 92057 Marty Mead 760-967-3981 Fax: 949-493-8366 marty@m2settlements.com All states	None	Conference calls In-house workshops Internet training Personal visits Study groups Web conferences	Marketing materials	Forms available Online application status Underwriting status

Companies

	Hardware and Software Support	Training Support	Marketing Support	Internet Support
<p>Marcus Insurance Agency, Inc., The 389 Boston Post Road Sudbury, MA 01776-3015 Melissa Cummings 978-443-4900 Fax: 978-443-9804 mccummings@themarkusagency.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 Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>Marketing Alliance, Inc., The 111 Westport Plaza Dr., Ste. 1010 St. Louis, MO 63146 Alan Protzel, CLU, ChFC 314-275-8713 Fax: 314-275-8813 aprotzel@themarketingalliance.com All states</p>	<p>Client management software 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 Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status</p>
<p>National College Funding Strategies, Inc. 10815 Rancho Bernardo Rd., #380 San Diego, CA 92127 Tim Johnson 858-675-0100 Fax: 858-675-0110 tim@imsinsurance.net All states</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 Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Product information Quotes available</p>
<p>National Long-Term Care Brokers 11 Executive Park Dr. Clifton Park, NY 12065 Bob Vandy 800-695-8224, ext. 105 Fax: 518-371-6131 bvandy@nylftcb.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 Complimentary LTC planning software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools 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 949-716-7051 Fax: 949-916-6475 Dan@oclifeinsurance.com Most of the U.S. AK, AZ, CA, CO, CT, FL, MD, WI</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Technical support</p>	<p>Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Quotes available</p>
<p>Ohlson Group, Inc., The 510 E. 96th St., #185 Indianapolis, IN 46240 Terri Gearlds 317-844-4411 Fax: 317-844-4422 tgearlds@ohlsongroup.com Most of the U.S.</p>	<p>Client management software Company/rate comparisons Hardware support Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Technical support Training software Visit our Web site: www.ohlsongroup.com</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Product information Quotes available Software to download Underwriting status</p>
<p>Partners Advantage Insurance Services, LLC 4733 Amber Valley Pkwy. South Fargo, ND 58104 Partners Advantage Life Express Team 888-251-5525, ext. 704 marketing@partnersadvantage.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Several exclusive sales systems and lead programs</p>	<p>Conference calls Continuing education classes In-house workshops Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status Rates, training, and sales tools</p>
<p>Petersen International Underwriters 23929 Valencia Blvd., Ste. 215 Valencia, CA 91355 661-254-0006 Fax: 661-254-0604 piu@piu.org International All states</p>	<p>None</p>	<p>Conference calls In-house workshops Personal visits Web conferences Tuninars for select producer groups</p>	<p>As needed Marketing materials</p>	<p>Forms available Online application status Product information Quotes available Underwriting status</p>

Companies

Hardware and Software Support

Training Support

Marketing Support

Internet Support

<p>PIPAC Life P.O. Box 769 Cedar Falls, IA 50613 Ryan Saul 319-277-8541 ryan@pipac.com Central U.S. — IA, IL, NE, SD</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Product information Quotes available Software to download</p>
<p>Resource Brokerage, LLC 1501 E. Woodfield Rd., Ste. 110E Schaumburg, IL 60173 Michael Walls, LTCP 800-605-7566 Fax: 847-619-9592 info@resourcebrokerage.com All states</p>	<p>Client management software Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Software for lead generation Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>As needed Marketing materials Staff support for case sales Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Underwriting status</p>
<p>Safe Harbor Financial, Inc. 2200 Benjamin Franklin Pkwy., Ste. 105 North Philadelphia, PA 19130 Nora Hutchinson 800-422-0557 Fax: 215-564-0155 nhutchinson@safeharborfinancial.com Most of the U.S. All states except AL, Guam, PR</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Sales presentation software Training software</p>	<p>Conference calls Third-party training books, CDs Web conferences</p>	<p>Lead generation program Marketing materials Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Underwriting status</p>
<p>Secured Financial Solutions, LLC 14301 N. 87th St., Ste. 116 Scottsdale, AZ 85260 Anil Vazirani 602-361-0093 Fax: 480-248-8988 vazirani1968@aol.com All states</p>	<p>Company/rate comparisons Sales presentation software</p>	<p>Continuing education classes In-house workshops Personal visits Third-party training books, CDs</p>	<p>Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Marketing tools Product information</p>
<p>Tomorrow's Financial Services 437 Newman Springs Road Lincroft, NJ 07738 Thomas P. Hyland 800-833-1862 Ext. 145 Fax: 732-576-4501 TPHyland@tfsweb.com All states, concentrated in CT, DE, FL, NJ, NY, PA</p>	<p>Client management software 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 Incentives for professional designations (CLU, CFP, etc.) Internet training Personal visits Third-party training books, CDs Web conferences</p>	<p>As needed Lead generation program Marketing materials Supplied leads Staff support for case sales Staff support for marketing programs Web site development</p>	<p>Forms available Marketing tools Online application status Product information Quotes available Software to download Underwriting status Securities forms Financial planning software</p>
<p>Underwriters Marketing Service Inc. 100 Century Pkwy., Ste. 350 Mt. Laurel, NJ 08054 Al Gray, CLU, ChFC - Financial Services Manager 800-524-1774 Fax: 856-727-0600 agray@callums.com All states</p>	<p>Company/rate comparisons Product illustration software on CD Sales presentation software Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Personal visits Web conferences</p>	<p>As needed Lead generation program Marketing materials</p>	<p>Forms available Marketing tools Product information Quotes available</p>
<p>Underwriting Specialists, Inc. P.O. Box 409 Fort Washington, PA 19034-0409 Robert Pickard 215-540-4470 Fax: 215-540-4471 RPickard@undspec.com All states</p>	<p>Company/rate comparisons Product illustration download</p>	<p>Conference calls In-house workshops Personal visits Web conferences</p>	<p>As needed Marketing materials Staff support for case sales</p>	<p>Forms available Online application status Quotes available Software to download Underwriting status</p>
<p>Wholehan Marketing Associates 7261 W. Central Ave. Toledo, Ohio 43617 Ernie Hart 419-473-2323 Fax: 419-473-2424 ernie@wholehan.com Most of the U.S.</p>	<p>Client management software Company/rate comparisons Product illustration download Sales presentation software Software for lead generation Training software</p>	<p>Conference calls Continuing education classes In-house workshops Internet training Personal visits Study groups Third-party training books, CDs Web conferences</p>	<p>Lead generation program Marketing materials Staff support for case sales Staff support for marketing programs</p>	<p>Forms available Marketing tools Online application status Product information Quotes available</p>
<p>Zenith Marketing Group, Inc. 303 West Main St., Ste. 200 Freehold, NJ 07728 Tony DeGregorio 800-733-0054, ext. 6413 Fax: 732-251-3178 td@zenithmarketing.com All states</p>	<p>Company/rate comparisons Product illustration download Product illustration software on CD Technical support</p>	<p>Conference calls Continuing education classes In-house workshops Web conferences</p>	<p>As needed Marketing materials Staff support for case sales</p>	<p>Forms available Online application status Product information Quotes available Software to download Underwriting status</p>