

Capability

InKnow*Vision*  
Premier Producer Group™



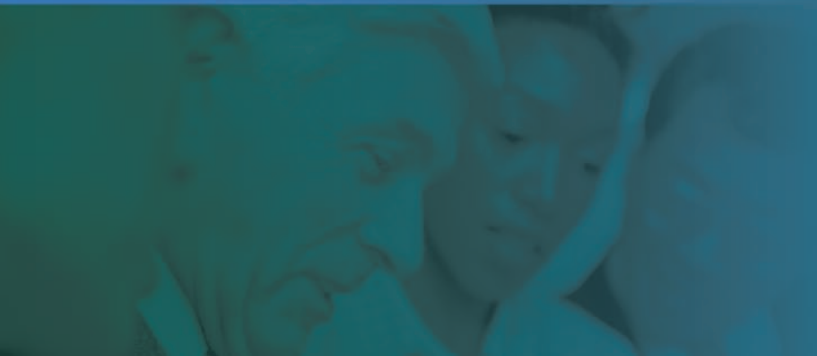
Competence

Compensation



Community

Collaboration



Collegiality

### Cutting Edge Planning Techniques & Strategies

The InKnow*Vision* design team provides the best in back office support, leaving you time to serve your best clients and their families, with confidence that other details are being taken care of. We serve attorneys, accountants, insurance professionals and financial advisors whose needs span from simple number crunching to collaborative strategy sessions and high-end design services.

We have completed over 600 engagements for families with wealth between \$8 million and \$180 million. We work directly with Premier Producers so that you and your clients receive exactly what you need, when you need it.



*Our mission is to provide you and your clients with the underwriting and compensation, but also in marketing, All with the highest degree of community and collegiality*

### Superior Medical Underwriting

Our expert underwriting team has more than 30 years of cumulative experience in both home office and general agency environments. Our team has established relationships and earned respect from prominent carriers, assuring the best possible offer on every case.

We don't just underwrite and handle case management; we develop the case with you using proven methods to ensure the best possible placement. Our proven method of underwriting and case design will give you confidence that your clients' insurance needs are in the right hands.

Our team of experts efficiently handles all aspects of case underwriting:

- Expedite medical record retrieval
- Complete medical summaries
- Determine product suitability
- Properly package your case and submit to carriers
- Provide 24/7 access to online case status through state-of-the-art technology
- Distribute data using completely paperless systems

We offer solutions that help make you and your company a success.



## Marketing

InKnow*Vision* and our strategic relationships have been marketing successfully in the business and high net worth markets for many years. There are numerous strategic ways that we can increase your market capability including:

- Newsletters
- Brochures
- Email Marketing
- Relationship Building Tools

We even have the technology to run automated campaigns on your behalf and track the results. We'll help you remain "top of mind" with your clients and prospects, and help demonstrate your capability and expertise.



*e best possible life insurance experience... Not just in strategy development, implementation, and education... ty.*



## Training & Education

The InKnow*Vision* Institute offers technical, marketing, and practical business education for financial and legal advisors who work with (or desire to work with) affluent clients and families.

In its semi-annual conferences, the Institute focuses on teamwork and collaboration; and instills competence and confidence in its professional participants.

We also offer complete training for our Family Wealth Diagnostic™ tool. This tool enables you to organize the case, gain complete understanding of your client's situation, spot risks and opportunities, and enhance your credibility with other client advisors and referral sources.

Other training resources include webcasts, white papers, case studies, online videos, sample questionnaires and agreements, and many other tools to enhance your knowledge and wisdom.

# Outstanding Support

## Help Desk

In addition to the pre-recorded information available on our website, members are entitled to contact InKnowVision professionals for live support. The help desk will provide three primary services:

## Quick Case Calls

These are scheduled blocks of time where we can discuss a specific case or a specific problem for which our technical expertise may be helpful.

## Marketing Calls

These are scheduled blocks of time where we discuss how to be more effective in your referral marketing campaigns.



## Live Calls

These calls will be scheduled from time to time to update our producers on strategies, product development, new features, or other subjects that may be of interest to our group. Calls will be recorded and available for download.

*It's easy to promise top payouts, superior underwriting, outstanding education and training, and the best customer service—and most companies do! But keeping those promises is a whole different story! Let us prove our capabilities, help you grow your business, and earn your trust and confidence!*



## Attractive Compensation

InKnowVision Premier Producers learn how to leverage their time and opportunities to generate a greater volume of quality business. And as that business is generated, we offer very attractive compensation! All of these services—and top payouts too!

**Call us at 630-470-6500**

InKnowVision®  
**Premier Producer Group™**

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