

Does your case qualify for Large Case Support?



Leverage Empire Life's Tax, Retirement and Estate Planning (TREP) team for formal subject matter expertise on all your Large Cases

Benefit from three value added approaches



Evaluation — Our experts will take the time to evaluate and understand your client's situation on an individual, family or corporate basis and make sure you have the information you need to make proper recommendations.



Collaboration — The TREP team will work with you, your client and their other trusted advisors to position their situation, their priorities and their objectives. Their subject matter expertise will allow for a more seamless collaboration during the underwriting process when looking to justify the financial aspect of your case.



Empowerment — Provide your clients with precise and easy to follow sales strategy presentations that will help them visualize and understand how they can achieve their financial goals.

Large Case Support Service Offering

At Empire Life, the Tax, Retirement and Estate Planning (TREP) team offers value added service offerings to support the qualified advisor or to provide formal subject matter expertise on large cases, as listed below.

10k + of Annual Premium

- ✓ A 1 hour meeting to discuss a case (via telephone or video).
- ✓ Collaborate with the underwriting team in order to validate the need and appropriateness of recommendation.
- ✓ Respond to technical questions related to case, including review of relevant documents.
- ✓ Provide support with product illustrations and sales concepts.
- ✓ Support in preparing the financial case.
- ✓ Assistance in drafting cover letter.
- ✓ Meeting with client's other advisors (e.g., accountant).

25k + of Annual Premium

Everything in the 10k+ list, plus:

Operations

- ✓ Upon reception, case is flagged as a Large Case.

Vendor Management

- ✓ Paramedical vendor manager reviews requirements and ensures case is treated with priority.

Underwriting

- ✓ Welcome email from underwriter once the application is received in underwriting.
- ✓ Additional requirements ordered with priority.
- ✓ All decisions are communicated with advisor and Account Executive.
- ✓ Adverse decisions will be communicated via a phone call.



Talk to your Empire Life Account Executive today about how we can help you better position your next large case!

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