Levinson & Associates

LIFE & ANNUITY IMO SINCE 1972

THE I-GENIUS PLAYBOOK

I-Genius

LIFE INSURANCE SIMPLIFIED!

I-GENIUS Platform- Levinson Agents utilize the “I-Genius” Turn-Key Sales Platform to elevate their practice to the next level without any out-of-pocket cost.

Please scroll down and click on the "more info" buttons to learn more

Agent Testimonials

01

See what other agents are saying about working with Levinson & Associates

MORE INFO

MORE INFO

02

Family Owned & Operated Since 1972

Cost sharing, incentives and perks to help build upon the relationships we currently enjoy with our Agents.

Full-Back Office Support

03

Including www.carylevinson.com

MORE INFO

Levinson & Associates
2018
LEVINSON AGENT
EXPO

MORE INFO

04

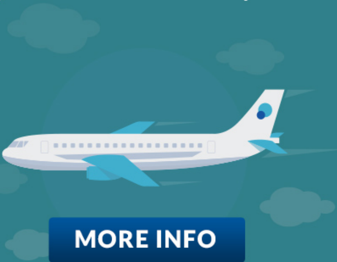
Free Annual Agent Expo

Learn from top industry leaders and agents from across the country.

5 Star Agent Trips

05

Starting at $15,000



MORE INFO

MORE INFO

06

Most Competitive Carrier Portfolio

75+ Carriers and 500+ Products

Exclusive Product Offerings & Exclusive Marketing Programs

07

MORE INFO

08

Weekly Training Webinars & Email Updates

MORE INFO

On-Demand Training Library

09

MORE INFO

MORE INFO

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LTC Center

Our LTC center allows you access to the most current and competitive LTC products, marketing collateral, quoting systems, and client approved materials.

Annuity Resource Center

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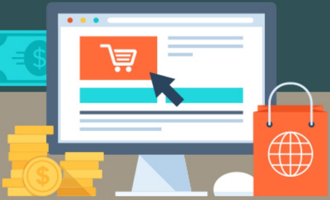

Our Annuity division is standing by ready to assist with your next case. Get access to annuity resources including product snapshots, suitability matrix, latest rates, consumer materials and annuity lead programs.

MORE INFO

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E-Contracting Portal

MORE INFO

Use our E-contracting portal to streamline your appointments

Just enter in your information 1 time and the portal auto populates all carriers, so getting started is a breeze!

Full 12 month advance + renewals

12 month advance + "full pass through" renewals available

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MORE INFO

E&O
DISCOUNT
PROFESSIONAL LIABILITY INSURANCE

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Exclusive E&O policy

For 1mil of coverage for all B+ rated or better carriers

MORE INFO

The Levinson & Associates Professional Liability Insurance Program providing Levinson Agents with a cutting-edge E&O liability product, with broad coverage, attractive pricing, plus online distribution for immediate coverage.

Agency Builder Platform

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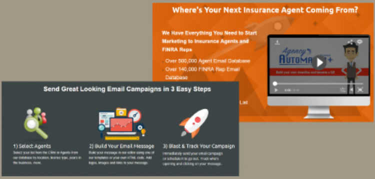

Where's Your Next Insurance Agent Coming From?

We Have Everything You Need to Start Marketing to Insurance Agents and FINRA Reps

- Over 500,000 Agent Email Database
- Over 140,000 FINRA Rep Email Database

Send Great Looking Email Campaigns in 3 Easy Steps

1) Select Agents
Select your list from the CRM or Agents from our database by location, license type, years in the business, more.

2) Build Your Email Message
Build your message in our editor using one of our templates or your own HTML code. Add logos, images and links to your message.

3) Blast & Track Your Campaign
Immediately send your email campaign or schedule it to go out. Track who's opening and clicking on your message.

We Have Everything You Need to Start Marketing and Recruiting New Insurance Agents, our turn-key platform allows you to find and recruit agents to build your agency.

MORE INFO

MORE INFO

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Real-Time Online Case Status updates

Mobile Quoting App for all Smartphones/Tablets

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Levinson & Associates

-including case status, quotes, e-app's, underwriting tools, and much more.

MORE INFO

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Exclusive E-applications & E-Delivery with most carriers

MORE INFO

As an agent with Levinson & Associates you are provided with a simpler process to submit cases.

New e-requirement tool integrated into our new site.

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- No more printing outstanding requirements and sending back to us.
- No more faxing/mailing requirements

MORE INFO

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Comprehensive In-House Impaired Risk Underwriting Department

Impaired Risk Division

MORE INFO

Online 24/7 Automated Underwriting Platform

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NO-COST UNDERWRITING SOFTWARE

launch xrae

MORE INFO

XRAE is the only software in the life insurance industry to address the inefficiencies existing at the beginning of the life insurance sales process.

Before a price can be quoted or an application selected, the correct underwriting class must be determined. XRAE enables users to quickly enter complex medical information about a client and instantly receive the correct underwriting class from multiple insurance carriers, including substandard classes.

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New I-GENIUS IUL Software

MORE INFO

The best IUL and Analysis software Available.

No-Cost Advanced Planning & Presentation Software

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FINANCIAL PLANNING

Find solutions for Buy Sell Agreements, Key Man, Split Dollar, and more!

MORE INFO

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Agency Automator CRM Platform

MORE INFO

Newly Released! Our Agency Automator is a CRM with built-in lead generation.
(Up to 1,000 new prospects monthly)

Agency Automator can revolutionize the way you do business

I-Genius Final Expense Platform

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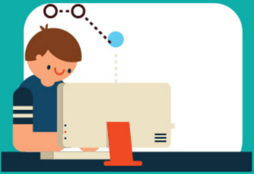

- -Exclusive & Qualified Final Expense Leads and or mailer program
- -Legacy Safeguard Consumer Final Expense Planning Software
- -Free college Scholarships for all children & grandchildren
- -Free Retail Website & Quoting Software
- -Top Products, Commissions, Renewals & 12 month advance available

MORE INFO

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Free Agent Website w/Quote Engine & Lead Capture Features

MORE INFO

Cost sharing, incentives and perks to help build upon the relationships we currently enjoy with our Agents.

Exclusive Sell While you Sleep Platform

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Buying and Selling Individual Insurance has never been Easier!

MORE INFO

LIGHTNING ⚡ ISSUE TERM™

MORE INFO

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Social Media Marketing Packages

Promote consumer driven products

Promote Lightning Issue Term on your social media & drive traffic to your website!

Exclusive Scholarship Platform

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Offer clients 1 year free scholarship for purchasing qualifying products (11 Carriers, 50+ Products , 380+ colleges)

As a Levinson agent you have the ability to take part in our Free College Scholarship Program. This allows you to attach Tuition Rewards to various life insurance and annuity products.

MORE INFO

30 Turn-Key Final Expense Marketing Platform Legacy Safeguard

MORE INFO

Leave a Lasting Legacy with Legacy Safeguard Overview and Membership Benefits

Levinson lead program.com 31

evinson & Associates

This site is dedicated to bringing you, our Levinson agents, the best lead generation systems anywhere in the market today

MORE INFO

32 Exclusive Mortgage Lead Program

MORE INFO

Turn Key Mortgage Lead Program

- $20 per Lead with 15 lead minimum
- Free leads with every order
- No Commission Cuts/Reductions
- No Lead Contracts/Commitments

Final Expense Mailer Co-op Program 33

($430/thousand) *Requires GA Approval

MORE INFO

I-Genius

34 I-Genius Leads

Exclusive & Qualified Final Expense & Mortgage Protection Co-op Lead Program

Campaigns are up and running within 24-48 hours after your order has been received

MORE INFO

GET STARTED NOW!

Please contact any member of our staff with questions:
800.375.2279 - carylevinson.com