



Cary's Corner

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From the desk of Cary A. Levinson

Cary's Corner – Volume 27

"The Most Important Points an IMO Can Provide for Their Agents"

To Our Valued Friends and Agents:

It literally feels like I wished everyone a "Happy New Year" last week, and now summer is almost upon us. I'm not quite sure where the time goes or why it's moving so quickly, but I can honestly share with everyone that I am still so thrilled to be a part of the excitement and joy of our industry after 51 years. In this edition of "Cary's Corner," I'd like to share with all of you what I believe are truly the most important points an IMO can provide for their agents. Again, these are points that I feel are most important to me for you to elevate your sales and your practice. What I would really appreciate after you finish reading this, are your comments and feedback and any ways you feel we can help improve our service to you and help you grow. What is most important to you, our valued agent, that you expect from your IMO? In the meantime, I will outline below the main objectives of our mission on a daily basis.

1. Regardless of an IMO's size, I feel it is imperative to allow our agents to feel appreciated and special. Even though we have over 22,000 agents under contract with at least one carrier, we always try to make every phone call and quote request special.

2. We must provide everyone with the necessary resources to help marketing life insurance and annuities. Quoting and underwriting tools are of key importance.

3. Provide unparalleled service to all agents. From application submission to commissions being paid, we must be involved in every way necessary. Our goal is to be your back office support team in every possible way from beginning to end.

4. A lead source is extremely important to most agents and we always try to provide the best possible options to our agents to help them close sales.

5. Technology today is vital. From creating an effective Facebook page, to professional social media graphics, Google and Yelp business pages, websites, including our IMND and "Sell While You Sleep" marketing strategies, are all necessary to help you become successful.

6. Agent training is crucial, as well, and this is why we do weekly training webinars and our annual Expo and Symposium are all designed to help train our agents.

7. We provide everyone with the services of three distinct Levinson divisions. From our Licensing and Contracting team, to our Case Managers and Life Brokerage experts, we try to answer each and every question, and solve every problem for you. 23 full time Levinson employees are here every day to assist you in preparing for, and closing sales.

8. We know and understand which carrier is best for your specific prospect. Whether your applicant has type 1 diabetes and is on 55 units of insulin or, is 5'9" and 310 pounds or, is deathly afraid of needles and is petrified to have blood drawn, we know what company and what product to recommend. We also have the answer to your product question and we will help you with case design.

9. And finally, I can help you with an underwriting offer you're not happy with. In many cases, I have a 20, 25 or even 30 year relationship with many carrier V.P.'s of Underwriting. I can fight for you to get that Standard offer to Preferred in many cases. And if I can't get them to improve the offer, I can at least give you the reasons why the Standard offer is a generous one. Additionally, although we try to be as perfect as possible, we are not

perfect. But we do want you to know that Bill and I are here if you would ever like to discuss a situation that you feel was not handled properly. We will stop at nothing to try and make it right.

10. To provide the best possible service our agents can receive anywhere.

So, these are my personal goals for Levinson and Associates and I certainly hope we are performing up to your expectations. Again, please feel free to provide me with any comments, suggestions and feedback you would like us to consider. And I will end as I usually do with thanking all of you for the amazing work you do for everyone. You are the only one there when families are suffering the most they ever have. You are the only one delivering not only a check, but hope for the future. And you are the only one who keeps families together and children in the same house and school when they lose a loved one. Thank you all for your loyalty and ongoing support through the past 51 years.

- **Cary A. Levinson**, *President*,
Levinson & Associates
