



# HOLISTIC TECH

HOW ADVISORS USE TECH TO OFFER COMPREHENSIVE SERVICE AND FUEL BREATHTAKING GROWTH

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THE **2017**  
TECH  
GUIDE



# One Update Every Agent Needs by 2018

## Is Your Office Ready for Agency Automator 2.0?

Before you close out the year, **Bill Levinson**, managing partner with Levinson & Associates, wants you to take stock of your current tech and marketing.

Most notably, he wants to make sure that you're not working too hard, wasting your valuable time with office tasks or missing opportunities to convert prospects into clients and current clients into even bigger ones.

Bill, known by many as the life and annuity industry's most prolific innovator, has been introducing tech that disrupts the status quo and makes agents' lives easier and their income brackets higher.

His advancements have been so monumental and game-changing that every time he announces a new breakthrough, two things always happen.

First, agents from around the country rush to his doors like the next iPhone is going on sale.

And second, other IMOs that can't keep pace start panicking. This year, even the developers are in awe of how easy an agent's job will become thanks to the release of Agency Automator 2.0.

So what's all the fuss about?

To a keen observer or any active agent with Levinson & Associates, this update is the long-awaited marriage between the two most powerful sales platforms in the industry, Agency Automator® and I-Genius®.

Unrolled several years ago, I-Genius remains the most comprehensive platform where agents can host their own

**“This takes almost all of the work out of an agent's hands. If you don't have Agency Automator 2.0 on your computer by January, you're working too hard and missing some really easy money.” — agent Elliott Diamond (beta tester)**

custom websites, increase their social media presence, allow site visitors to run live quotes (with built-in lead capture), and select and buy nearly a dozen products online — without any agent interaction.

Released last year, Agency Automator was the first CRM ever designed from the ground up to meet the specific and unique needs of life and annuity agents. Not only was it the most agent-friendly client dashboard, but also it is the most powerful, integrated lead-gen tool available, handing agents 1,000 qualified leads per month so they can automatically and instantly develop and launch all sorts of marketing email campaigns to those prospects.

What does the merger of the two powerhouse technologies mean for agents like you?

Quite a lot, according to Levinson.

“If you want to remain top of mind and maximize your sales, then you have to anticipate and embrace how your clients do business. Like it or not, times are changing, and 90 percent of your market is online. Eighty percent



Bill Levinson, managing partner

of your prospects would rather buy online and skip the human interaction if at all possible. Now that Agency Automator is updating to version 2.0, your prospects can become your clients and buy from a multitude of insurance products directly from your website, giving you the credit and commission for every product sold!” Levinson exclaimed.

**“If you want to remain top of mind and maximize your sales, then you have to anticipate and embrace how your clients do business.”**

And it gets even better.

Agents can now easily and automatically capture, market to and sell — using customizable drip campaigns proven to increase sales — to anyone who has responded to their social media posts, visited their website or clicked on an email. They're automatically added into the agent's CRM.

So if you want to send out a drip campaign specifically to people who ran an online quote but didn't buy, you can! Want to follow up with an online purchase to see whether they'd do better with another product? Piece of cake! And if you want to follow up on prospects who opened an email you sent but took no action, you can set up a unique campaign for that too!

Every marketing angle that you can think of can be easily and intuitively handled, thanks to Agency Automator 2.0.

And if anything becomes too technical, don't worry! Agency Automator 2.0 has you covered there too!

That's because it comes with your own real life virtual assistant. This optional virtual assistant provides up to 10 hours of dedicated support to help you build and send your email campaigns, update your CRM records and fill your calendar with scheduled

calls and meetings resulting from your Agency Automator campaigns.”

Now, in addition to gaining revenue from online purchases, all agents have to do is show up to appointments!

And for agents looking to build their very own downline, Agency Automator 2.0 also offers a special upgrade called Agency Automator Plus that allows the user to easily switch between prospecting for clients and recruiting new agents.

**“If that doesn't take all of the work off an agent's hands, I don't know what else will,” said Levinson.**

For more information regarding this powerful upgrade and to make sure you're one of the first agents in line when Agency Automator 2.0 becomes available in January 2018, visit [www.Automator20.com](http://www.Automator20.com) today!



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# WHAT MAKES LEVINSON & ASSOCIATES 2017'S FASTEST-GROWING IMO?

“We exist *solely* to set our agents up for success.” – Bill Levinson, Managing Partner at Levinson & Associates



It's barely the second half of 2017 and agents can't get enough of Levinson & Associates. For people in the know, the news is nothing shocking.

Since opening their doors in 1972, the national Life IMO built its reputation on the idea that **agents deserve premier-level service, support, and products.**

In fact, Managing Partner Bill Levinson works so tirelessly to ensure his agents become as fulfilled and successful as possible that the company has – on many occasions – developed industry-first technology.

Levinson & Associates was the first to unveil the **Agency Automator**, an interface that allows agents to make commission-landing deals in their sleep... hybrid CRM software that automatically generates 1,000 new leads per month... an app for smartphones to quote and apply on the spot... individual, full-service websites with lead

capture, built-in quoting engines, calculators, health analyzers and much, much more.

To top it off, they maintain an **industry-leading compensation plan** along with innovative tech and exclusive sales programs like the Levinson Scholarship Platform.

All in all, the more Levinson & Associates takes care of its agents, the more it pays off in droves. Not only has the IMO absolutely thrived the past several years, taking on new agent after new agent... **but the agents themselves see more success since joining Levinson.**

**Think your agency or IMO can beat Levinson & Associates? Then make a list right now of everything your company's done for you. After that, go to [www.TheAgentsIMO.com](http://www.TheAgentsIMO.com) to compare and see why Levinson & Associates, time and again, has earned its reputation for being “The Agent's Leading IMO.”**



I made the best decision of my life by getting appointed with Levinson & Associates last year. Thank you so much for your great support. **Levinson always provides me with up-to-date information on my cases,** as well as many carriers to choose from. Your company has the latest technology and programs to make my job so easy! Kudos for being THE BEST!

— Lilly



If you're an agent or an agency that's looking to work with genuine people who truly have your back, whether you're **looking for an affordable lead program,** additional training, or perhaps staying updated with today's innovative technology such as a CRM tool, then look no further — they offer it all. I know from many years of experience that they are truly one of the best IMO's in the industry.

— Ian



As veterans of the insurance industry, we have seen many changes during our 20-year career. However, one thing that has never changed is the excellent service that we receive from Levinson & Associates. **This organization is by far the best IMO that I have encountered in my career,** and it is because they have cultivated an atmosphere of humility, trust and respect.”

— John & Serg



“As an Investment Advisor Representative working with individuals and families approaching retirement it is critically important to be able to partner with an IMO who **provides both excellent companies and support to serve these clients** in a fiduciary manner. The Levinson organization provides a trusted business relationship. Great folks!”

— Joseph



Since 1972

**Will you be the next Levinson & Associates agent to thrive?**

Visit [www.TheAgentsIMO.com](http://www.TheAgentsIMO.com) today and see for yourself why many consider Levinson “The Agent's Leading IMO.”