

# The I-Genius PLAYBOOK

## Life Insurance Simplified!



+



**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 to learn more\***

**\*You must be logged in to [levinsonandassociates.com](http://levinsonandassociates.com) to access all "more info" buttons.**





## AGENT TESTIMONIALS

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



more info



## FAMILY OWNED & OPERATED SINCE 1972

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



more info



## Full-Back Office Support

Including [carylevinson.com](http://carylevinson.com)



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## Free Annual Agent Expo

Learn from top industry leaders and agents from across the country



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## 5 Star Agent Trips

Starting at \$15,000



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## Most Competitive Carrier Portfolio

80+ Life Carriers

25+ Annuity Carriers

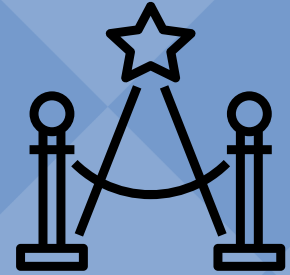
500+ products



more info



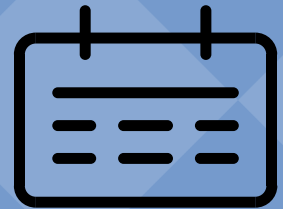
## Exclusive Products & Marketing programs



more info



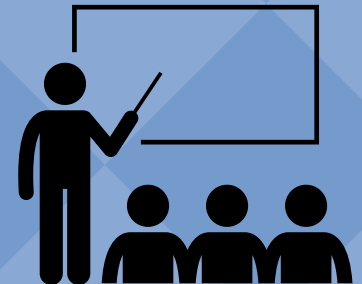
## Weekly Training Webinars & Email Updates



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## On-Demand Training Library



more info



## LTC Center

Get access to top LTC products, marketing materials and training



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## Premium Finance Resources

Access our premium finance resources, including premium finance with a 0% reduction in commissions



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## E-Contracting Portal

Streamline your agent appointments with our e-contracting platforms



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## Full 12 month advance + renewals

12 month advance + "full pass through" renewals available



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## Exclusive E&O policy



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## Agency Builder Platform

Everything you need to recruit and build your agency



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## Real-Time Online Case Status updates



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## Mobile Quoting App for Smartphones / Tablets

Including case status, quotes, e-apps, underwriting tools, and much more!



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## Exclusive E-applications & E-Delivery with most carriers

As a Levinson agent, you are provided with a simpler process to submit cases



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## New e-requirement Tool integrated

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



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## Comprehensive In-House Impaired Risk Underwriting Department



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## Online 24/7 Automated Underwriting Platform

Access software to quickly assess underwriting risk and receive a tentative offer within 24 hours



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## The IUL Experience

Everything you need to sell and market Indexed Universal Life! Sales software, marketing materials, product training, and IUL Leads!



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## No-Cost Advance Planning & Presentation Software

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

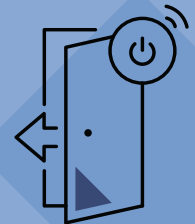


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## Agency Automator CRM Platform

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

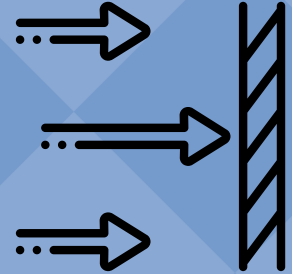


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## The Final Expense Experience

Everything you need to market Final Expense, including training, lead systems, scripts, client approved marketing materials and more!



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## Free Website w/Quote Engine & Lead Capture Features

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

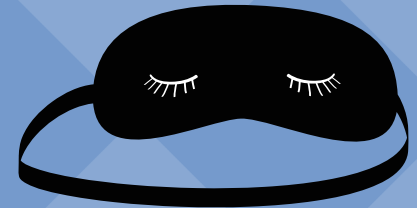


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## Exclusive Sell While You Sleep Platform

Buying and Selling insurance has never been easier! Clients can quote and apply right from your website for Life, Critical Illness, Accident, & Disability Coverage!



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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!



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## Exclusive Scholarship Platform

Offer clients up to 1 year free scholarship for purchasing qualifying products (11 carriers, 50+ products, 400+ colleges)



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## Turn-Key Final Expense Marketing Platform Legacy Safeguard

Leave a Lasting Legacy with Legacy Safeguard Overview and Membership Benefits



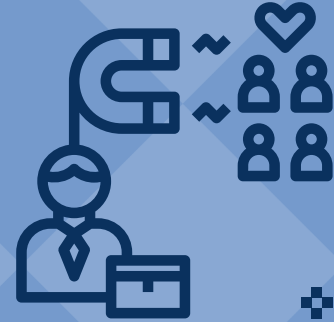
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## Levinson Lead Program

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



more info



## Exclusive Mortgage Lead Program

### Turn Key Lead Program

- Special Rates for Levinson Agents
- No Commission Cuts/ Reductions
- No Lead Contracts/ Commitments



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## I- Genius Leads

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

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



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### Assurwerx

- Target local consumers by zip code who are in the market for life insurance, including those who are recently married, just moved, or just started a family
- Link your ad to your website to drive traffic and generate leads



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### Life Settlement Department

Are you leaving money on the table for you and your client? Check out this strategy to increase your income and maximize your fiduciary responsibility!



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### Legacy Armour Platform

Use Legacy Armour as a sales enablement tool and watch your funnel fill up with more qualified leads when you offer Legacy Armour to your clients



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## Exclusive Agent Benefits

Get access to group life, accidental death, long term disability, deferred compensation, stock bonus plan, and a co-op advertising program



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## Levinson Annuity Experience

Experience Annuities on a whole new level! Take selling and promoting annuities to the next level with our annuity microsite [levinsonannuityexperience.com](http://levinsonannuityexperience.com)!

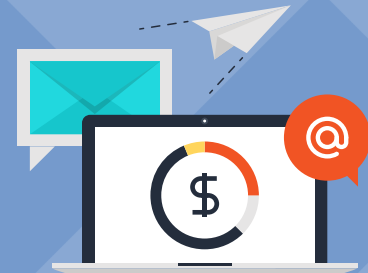


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## Digital Marketing Resources

Access top retail website options, social media platforms and exclusive digital marketing resources.

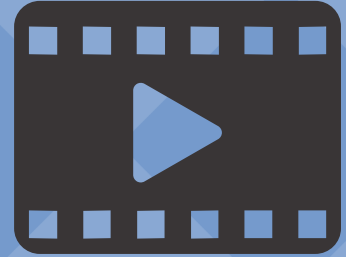


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## Custom Marketing Videos

Let the Levinson Marketing Team create your custom marketing videos for both Living Benefits & your Insuremenowdirect.com Platform.



» Living Benefits

» IMND

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## Complete Final Expense All-in-1 Quote & Underwriting Tool

Access top Final Expense Quotes on the go with Levinson's Final Expense Quote Engine featuring built in underwriting tools.



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## Agency Automator Annuity Platform

Access Top Annuity Sales Resources, Marketing Templates, Annuity Sales Websites, and Annuity Prospecting Tools to grow your annuity business



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## **Distribution Specialist Sales Support**

Levinson & Associates' Agents have the opportunity to work with a Distribution Sales Expert to assist in the sales process for qualified clients/prospects. Please contact our Marketing team to request a consultation.



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**Please contact any member of our staff  
with questions: 800.375.2279  
Levinsonandassociates.com**



**GET STARTED NOW!**