

# Strategic Moves for Agents & Advisors to Scale Profits



# Levinson & Associates focuses on helping agents and advisors grow their business in the life, annuity, and senior market.

No business should be held back by its size, skill sets, and resources. For over 30 years, we have assembled top performers and leadership with unique skill sets across various markets. The resulting platform has all of the resources to support, equip, and empower you and your business to think differently and then be able to execute in those areas that provide the right growth opportunities.

To grow your business requires embracing the right technology, depending on the proper support, and relying on guidance that will improve what you are currently doing. To scale your business depends on diversifying among several markets, allowing you to get a more significant wallet share of your client's business.

## Ask yourself this:

- Are you using the same strategies that your competitors are?
- What resources are you investing in now to set yourself up for success?
- Are the decisions for your business proactive or reactive?
- Are the things that you don't know holding you back?
- What experience are you leaning on to help you make these decisions?

## What you will experience working with Levinson & Associates;

- Work with a team for each market that has taken others down the path to success.
- Create a unique value proposition compared to your competition.
- Grow revenue.

The number one thing holding you and your business back is your blind spots. A fresh external perspective from a trusted source helps you seize opportunities instead of reacting to issues.

Whose shoulders are you standing on?



**“If I have seen further than others, it is by standing upon the shoulders of giants.”**

**-Isaac Newton-**



# Grow & Scale Your business

Real growth hinges on your ability to attract new clients, easily convey solutions, and provide other services when your clients need them. That's why we have proven processes that allow you to play to your strengths to grow your revenue.

## LIFE

- Sales and marketing insight & strategies
- Aligning carriers to match your strategies
- IUL training and sales system
- Leveraged retirement strategies and sales systems
- Premium finance
- Life settlements
- Revenue Booster for P&C agencies

## ANNUITY

- Marketing strategies & insight
- Aligning carriers to match your clients and business
- Annuity University
- Virtual Point of Sales Tool
- Case design
- Back office support

## SENIOR MARKETS

- Extensive On-Demand Training Platform
  - Individual trainers
  - Training videos ~ 80+
- Senior Markets University
- Marketing systems
- Quoting & presentation tools