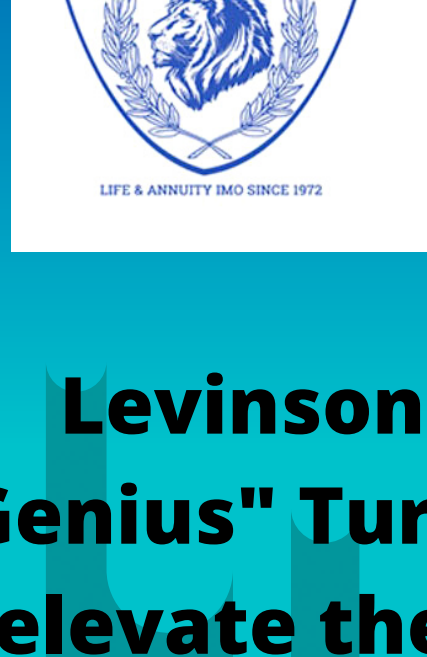


The I-Genius PLAYBOOK

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 to access all "more info" buttons.



2 FAMILY OWNED & OPERATED SINCE 1972

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

[» more info](#)

4 Free Annual Agent Expo

Learn from top industry leaders and agents from across the country

[» more info](#)

6 Most Competitive Carrier Portfolio

75+ Carriers
500+ products

[» more info](#)

8 Weekly Training Webinars & Email Updates

[» more info](#)

10 LTC Center

Get access to top LTC products, marketing materials and training

[» more info](#)

12 E-Contracting Portal

Streamline your agent appointments with our e-contracting platforms

[» more info](#)

14 Exclusive E&O policy

Special Levinson agent only discounts



[» more info](#)

16 Real-Time Online Case Status updates

[» more info](#)

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

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

[» more info](#)

20 Comprehensive In-House Impaired Risk Underwriting Department

[» more info](#)

22 The IUL Experience

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

[» more info](#)

24 Agency Automater CRM Platform

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

[» more info](#)

26 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.

[» more info](#)

28 Social Media Marketing Packages

- Promote consumer driven products
- Promote Lightning Issue Term on your social media & drive traffic to your website!

[» more info](#)

30 Turn-Key Final Expense Marketing Platform Legacy Safeguard

Leave a Lasting Legacy with Legacy Safeguard Overview and Membership Benefits

[» more info](#)

32 Exclusive Mortgage Lead Program

Turn Key Lead Program

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

[» more info](#)

34 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

[» more info](#)

36 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

[» more info](#)

38 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!

[» more info](#)

1 AGENT TESTIMONIALS

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

[» more info](#)

3 Full-Back Office Support

Including carylevinson.com

[» more info](#)

5 5 Star Agent Trips

Starting at \$15,000

[» more info](#)

7 Exclusive Products & Marketing programs

[» more info](#)

9 On-Demand Training Library

[» more info](#)

11 Premium Finance Resources

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

[» more info](#)

13 Full 12 month advance + renewals

12 month advance + "full pass through" renewals available

[» more info](#)

15 Agency Builder Platform

Everything you need to recruit and build your agency

[» more info](#)

17 Mobile Quoting App for Smartphones / Tablets

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

[» more info](#)

19 New e-requirement Tool integrated

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

[» more info](#)

21 Online 24/7 Automated Underwriting Platform



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

[» more info](#)

23 No-Cost Advance Planning & Presentation Software

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

[» more info](#)

25 The Final Expense Experience

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

[» more info](#)

27 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!

[» more info](#)

29 Exclusive Scholarship Platform

Offer clients up to 1 year free scholarship for purchasing qualifying products¹ (11 carriers, 50+ products, 400+ colleges)

[» more info](#)

31 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](#)

33 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

[» more info](#)

35 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!

[» more info](#)

37 Exclusive Agent Benefits

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

[» more info](#)

39 Digital Marketing Resources

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

[» more info](#)

Please contact any member of our staff with questions:

800.375.2279

carylevinson.com

» GET STARTED NOW!