

How Your Application Will Be Handled

Step 1:

Meeting with John

Step 2:

Sign and complete applications

Step 3:

John forwards applications to Gina who then processes them and forwards them to the appropriate company.

If any pertinent information is missing from the application(s), Gina will call to follow-up with you.

Step 4:

Every week Gina places a follow-up call to the appropriate companies. You will receive a call every week from either John or Gina to let you know your status.

If the companies are requesting additional information, we will let you know during our phone call.

If you are transferring funds from another company, the process can take up to six weeks. While we do everything we can to expedite this process, the transferring company does have the right to hold the funds for a set period of time.

Step 5:

Once the policy or account is opened, we will let you know. If you have an annuity or life insurance policy, you can either have us mail it to you or schedule a meeting with John to review it.

Step 6:

You will continue to hear from us throughout the year. You will receive our monthly newsletter, invites to client events, and periodic phone calls from John. Of course, you can always call if you need to schedule an appointment or have a question.

Thank you for the opportunity to be of service.