



Getting Started with The Sales Activity Manager™

for Insurance & Financial Services Professionals

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What is Sales Activity Management?

It is a philosophy and a strategy that empowers its users to have more confidence and better control of their own success by providing a performance road map to get on track and stay on track. It is the belief that we all have the potential to achieve great things and that activity management doesn't leave success to chance. Here is a more complete definition:

Sales Activity Management: the self-empowering process of identifying, managing and measuring high-payoff sales activities in order to continually improve results.

By using the principles of activity management you will achieve a better understanding of your business. You will be able to see both the activities that are driving your results, as well as identify where bottlenecks are occurring. Your manager or mentor can play a crucial role in clearing any bottlenecks by helping you to diagnose them and develop solutions.

Three Principles of Sales Activity Management

These are the three guiding principles of sales activity management:

- Sales is a numbers game (Quantity)
- Quality activities produce quality results (Quality)
- What gets measured tends to get done – and improve (Measurement)

By measuring the quality and quantity of sales activities you'll gain a solid understanding of your practice and where your strengths and opportunities for improvement lie. Activity management is a career long commitment. You should avoid the mistake of thinking that activity-tracking is only necessary during the early years of your career. Discipline is a career-long commitment that can pay big dividends.

Although activity management will certainly improve your performance when implemented correctly, it is not a panacea. We can't forget that the financial services business is first and foremost a people business. Remember that you are behind the numbers and at the end of the day, those who establish the best relationships and see the most people, will succeed.

Finally, you must accept the fact that you are ultimately responsible for your own success. It has been said that destiny is not a matter of chance, but one of choice. It is the activities that you choose to perform that will ultimately shape your destiny, and you are the one who is responsible and in control of those activities.

We wish you the greatest of success, and trust that eScoreBoard will help you achieve it. We have included the following recommended readings to help you get started.

The Spirit to Serve, by J.W. Marriott
E-Myth, by Michael Gerber
As a Man Thinketh, by James Allen
Think & Grow Rich, by Napoleon Hill
The Common Denominator of Success, by Albert E.N. Gray

Getting Started - Sales Activity Manager™ Review/Activity

As a result of your Sales Activity Manager review and completing this activity, you will:

- Become familiar with the basic functionality of your Planner
- Perform the 4 Basic Planner Skills:
 1. Complete Your Simple Business Plan
 2. Post Your Goals
 3. Keep Score Daily
 4. Weekly Totals
- Become familiar with the Sales Activity Manager Definition of Terms
- Review/Develop a Sample Model Week
- Review/Complete the Business Management section
- Review the Scorekeeping Guidelines

Instructions:

- The Associate's Activity Checklist below details a suggested process for learning to use your planner
- Use the Associate's Activity Checklist to track your progress as you complete each task

Status	Task/Outcome	Where To Find It
	Read: <ul style="list-style-type: none"> • Introduction • What is Sales Activity Management • Three Principles of SAM • <i>What's in it for me?</i> brochure Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide <i>What's in it for me?</i> brochure
	Step 1 <i>Complete the Simple Business Plan</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide Sales Activity Manager
	Step 2 <i>Post Your Goals</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide Sales Activity Manager
	Step 3 <i>Keep Score Daily</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide Sales Activity Manager
	Step 4 <i>Weekly Totals</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide Sales Activity Manager
	Step 5 <i>Review the Sales Activity Manager Definition of Terms</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide
	Step 6 <i>Review/Develop the Sample Model Week</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide
	Step 7 <i>Review/Begin updating the Business Management Section</i> Check status box and continue to the next task.	Sales Activity Manager Getting Started Guide Sales Activity Manager
	Step 8 <i>Review the Scorekeeping Guidelines Section</i> Check status box. Refer often to the Getting Started Guide!	Sales Activity Manager Getting Started Guide

Step 1 - Complete the Simple Business Plan

In order to be successful in any endeavor, you need a strong sense of purpose, clear direction and proper action steps. Goal setting helps you in all three categories. We describe them as: Why Goals, What Goals and How Goals. **THE SIMPLE PGA BUSINESS PLAN**, located in the front of your planner, will help you to clarify your “Why Goals”, or Purpose; with your Personal Mission; Business Vision and Guiding Principles; your “What Goals”; or Business Goals; by stating your Income and Professional Goals. Please confer with your Manager to develop your “How Goals”; or Action Plan by calculating your activity goals.

The sample sections that follow come from real producers that have completed the Simple Business Plan and are provided to give you ideas to consider. Keep in mind that your plan should reflect your personal feelings, what motivates you and your goals.



Refer to the front of your Sales Activity Manager™ (the second page) and follow the instructions to complete your Simple Business Plan.

I. Purpose

- ☐ Read the definition below and complete your Personal Mission in your planner.

PERSONAL MISSION

My personal mission is to truly make a difference in the world and to feel personally fulfilled by the work that I do.

Personal Mission

A Mission Statement is a clear statement that represents your true motivators for taking action. It goes beyond the superficial to the deep seated reasons why you want to become more successful and what will motivate you to do so. Very often it represents family, feelings and legacy. It inspires passion, and feeds the spirit...not the wallet. A personal mission statement is usually very personal and stated in a way that is non-measurable, non-numerical and inspirational. It may include phrases like: To be well thought of and respected; To be successful; To have a great image/reputation; To become a leader; To provide a wonderful environment and ideal lifestyle for my family to enjoy, To make a difference, To carefully balance the needs of my family and work, etc. It's your true reason to get out of bed in the morning.

Figure 1: Sample Personal Mission

- ☐ Read the definition below and complete your Business Vision in your planner.

BUSINESS VISION

My business vision is to build my practice with integrity to establish my reputation in the community. I will achieve MDRT level production by the end of the year.

Business Vision

A Business Vision Statement is a clear statement of what you want your business to look like in the future, i.e. 1-5 years. It can be stated in terms of size, reputation, prominence and/or production. Your business vision must be congruent with and help you accomplish your personal mission. Examples: To build a full-services practice with the finest reputation in the city; To qualify for MDRT, Top of the Table, and Court of the Table.

Figure 2: Sample Business Vision

- ☐ Read the definition below and complete your Guiding Principles in your planner.

GUIDING PRINCIPLES

My guiding principles are to conduct myself with honesty and integrity so that I will never feel personally compromised.

Guiding Principles

The emotional rules that govern your personal and business behavior make up your guiding principles and reflect your core values. They are the formal and informal ways that you conduct yourself, and the next step is to make sure that your behavior is consistent and congruent with your personal mission and business vision. Examples: Honesty, integrity, work ethic, kindness, mutual respect, punctuality, profitability, etc.

Figure 3: Sample Guiding Principles

II. Business Goals (Financial/Professional)

“What” Goals are your objectives for the year. Be specific, notice that the income goal gives you the opportunity to review your goals in 3 ways; Basic, Preferred and Dream Lifestyle. Consider these definitions:

Basic: meeting your basic income needs (versus your expenses).

Preferred: achieving your first level leaders club for your company or MDRT.

Dream: what would you achieve in your dreams? Top level leaders club; a new house, or dream car?

- ☐ **Complete** your income goals along with your Professional Goals; i.e., industry designation (e.g., CLU, ChFC, CFP), product specialty, etc...

A. Income Goal:	\$ 35,000	\$ 75,000	\$ 100,000
	Basic Lifestyle	Preferred Lifestyle	Dream Lifestyle

B. What are my three primary professional goals this year? (Position, Designations/Awards, Skills, MDRT, etc.)

- Achieve my Dream Lifestyle income goal*
- Penetrate minimum of 3 target markets*
- Complete my first CLU course*

Figure 3: Sample Income and Professional Goals

Goals should have six qualities, represented by SAM-I-AM: Specific, Activated, Measurable - Incremental - Achievable, Motivational. Focus on the week, but treat each day like game day.

Step 2 - Post Your Goals

One of the greatest benefits of the Sales Activity Manager is the way it keeps your goals in front of you at all times, by having you print them in the Goal Boxes across the top of each week-at-a-glance page. Posting your goals each week helps to provide continuity (both consciously and subconsciously) with your business plan.

SALES ACTIVITY PROGRESS for the Week:	Dials (1)	Reached (1)	Appts. Set (1)	Appts. Made	Appts. Kept	Referral Attempts	Referrals Obtained	New Seens
Goal:								
Actual:								

Business Meals (1)	Qualified Suspects (.5)	Fact Finders (1)	Cases Open (1)	Closes (1)	Buying Entities	New Clients

Step 3 - Keep Score Daily

You may not be able to control your results, but you can influence them by controlling your activities. Giving yourself credit by recognizing your accomplishments helps balance out the emotional roller-coaster often associated with your sales/planning cycle.

The grids across the bottom of the week-at-a-glance calendar pages make it easy to keep score daily by providing you with boxes to capture your activity as you perform them throughout the day.

Dials

For every call that you make to a prospect, number it sequentially; if you contact the prospect (or someone who has the ability to set an appointment) directly, circle the number; and if you schedule an appointment, place a checkmark through the circled number in that box. If a prospect returns your call circle the next open box and put a checkmark in that box if an appointment is set.

Dials = Numbers

Reached = Circles

Appts. Set = Check-marks

DIALS	1	2	3	4	5	6	7	8	9	10	New Seens=
	11	12	13	14	15	16	17	18	19	20	Meals=
											QS=
											Facts=
											CO=
											CL=
	Reached= 3					Set= 2					
	Made/Kept= 4 / 3					Att/Obt= 2 / 3					Points for Day=

Note: your planner pages contain enough boxes for 50 dials per day.

All Other Activity Grids

Tally the results of your Prospect Calls into the appropriate boxes to the right, then, at the end of each day, review that day's calendar entries and transfer the information to the balance of the boxes; i.e., interview activity and sales results.

SALES ACTIVITY PROGRESS for the Week:		Dials (1)	Reached (1)	Appts. Set (1)	Appts. Made	Appts. Kept	Referral Attempts	Referrals Obtained	New Seens
	Goal:								
	Actual:								

<i>Business Meals (1)</i>	<i>Qualified Suspects (.5)</i>	<i>Fact Finders (1)</i>	<i>Cases Open (1)</i>	<i>Closes (1)</i>	<i>Buying Entities</i>	<i>New Clients</i>

DIALS							New Seens=
							Meals=
							QS=
							Facts=
							CO=
							CL=
	Reached=			Set=			
	Made/Kept=			Att/Obt=			Points for Day=

Sales Activity Manager Definition of Terms

BUSINESS MEALS* A kept business appointment taking place over a meal. (Optional)

**QUALIFIED
SUSPECTS***

A person or business entity that meets your minimum criteria for a potential client. To be “Qualified” you should generally know a Suspect’s name, age, address, occupation, title, approximate income and telephone number. All “Referrals Obtained” who are qualified should be included in this total.

**FACT
FINDERS***

The total number of new Fact-Finders completed. These only include new, initial Fact-Finding interviews, not interviews where facts are updated on existing prospects or clients.

**CASES
OPEN***

Refers to a person or business entity that you have enough information about that, in your opinion, has a strong interest in doing business with you, and someone with whom you most likely have a future appointment scheduled. This can refer to either business with a new prospect, or repeat business with an existing client.

CLOSES*

Any meeting or interview in which you ask a prospect or client for their business. It most commonly refers to asking for money, but may also refer to a request for their signature or approval for anything that advances the sale toward a successful conclusion. You are asking the prospect or client to take an action which is required for the finalization of the sale.

**BUYING
ENTITIES**

The number of households, families, pocket books or organizations that purchase your product or service. Since you may sell multiple insurance products or other financial instruments to one entity, this is a vital number to track and the only way in which you can accurately track your “closing ratio.”

NEW CLIENTS

This is the number of premium or commission payers (individuals/entities) upon whom you have submitted business who are new to your practice for either core life or other financial products. (Existing clients who make repeat purchases are not included.) This is a measure of client-base growth.

Products Sold**INSURANCE
APPS/LIVES**

This is the number of submitted life insurance or related insurance sales units. These are generally sales that require underwriting such as life, disability or long term care insurance. However, some offices include annuities in this category.

**INVESTMENT
PRODUCTS**

This is the number of submitted sales of products that do not require underwriting such as equities/securities, annuities and other financial products or fees. Be sure to check with management for clarification.

**FYC OR
PREMIUM**

This is the First Year Commission or annualized premium value of the submitted sales in the “Insurance” and “Investment Products” sales categories. You can choose which method of tracking (FYC or Premium) works best for you, as well as if you want to use a GDC equivalent.

**POINTS FOR
THE DAY**

Many agents and agencies convert key activities to points as a way of keeping score and measuring performance. All of the above activities that have an asterisk (*) are suggested categories for earning points. The shaded boxes at the bottom of the week-at-a-glance pages indicate that these activities earn points.

Points Table:

Business Meals	1 point
Qualified Suspects	½ point
Fact Finders	1 point
Cases Open	1 point
Closing Interviews	1 point

Be sure to check with your management team as to what system of point gathering, if any, is used in your agency/branch.

Develop a Model Week

Time management is an essential part of building your practice and using a model work week helps to keep you focused on your high pay-off sales activities. Utilize the model week provided to you by your manager and/or refer to the sample that follows. The key is to create model week for yourself that matches your practice and market. While there is no doubt that you need to “seize the day”, you must do so with the “week” in mind and “seize the week” with as much enthusiasm.

While keeping in mind your key tasks, identify them appropriately on your calendar pages, and transfer those activities that you deem necessary to the monthly calendar pages. Using your week-at-a-glance calendar pages, block out productivity time, administrative time, self-development time, personal time, etc., from Monday through Saturday, to the best of your ability.

	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	
	Exercise (Recommended)	Personal Time	Exercise (Recommended)	Personal Time	Exercise (Recommended)	Personal Time	
7:00	Organizational/ Team Meeting	Mail & E-Mail	Mail & E-Mail	Mail & E-Mail	Mail & E-Mail		
7:30		Role Play: Phone Scripts	Review Marketing Plan	Review Referral Scripts	Administrative/ Clean-up Time		
8:00							Phone Clinic Kick Off
8:30							
9:00	CLASSROOM TRAINING: Fact Finders Key Money Concerns Drill for Skill Getting Referrals Closing Interviews	Phone Clinic and/or Prospecting Time	Classroom Training: Case Analysis	Role Play: Phone Scripts Referral Scripts	Prospecting/ Marketing/ Early Appointments	Appointment (Optional)	
9:30							
10:00							
10:30							
11:00							
11:30							
12:00							
12:30							
1:00	Lunch and Learn	Lunch and Learn	Lunch and Learn	Lunch and Learn	Lunch and Learn	Personal Time	
1:30							
2:00	Return Calls	Return Calls	Return Calls	Return Calls	Return Calls		
2:30	Individual 1-on-1's: (PEP/GOALS Activity Review)	Prospecting/ Marketing	Prospecting/ Marketing/ Early Appointments	Prospecting/ Marketing	Team Meeting: Weekly Activity Planning		
3:00							
3:30							
4:00	Prospecting/ Marketing			Personal Time	Case Review with Manager		
4:30							
5:00						SUNDAY	
5:30	Appointment	Phone Clinic Kick Off	Appointment	Appointment	Phone Clinic Kick Off	Personal Time	
6:00		Phone Clinic 50-100 Dials (Record Data in SAM Book)					
6:30							
7:00	Appointment		Appointment	Appointment	Hand-in Activity Re- ports/eScoreboard		
7:30							
8:00							
8:30	Appointment	Personal Time	Appointment	Appointment	Personal Time		
9:00							

Types of Appointments: Fact Finders, Closing, Strategy, Service, etc.

Business Management

The final step is to maintain your business plan over time to ensure success. Be sure to involve your manager to receive the proper coaching and support. This objective opinion is critical to achieving your goals.

The Sales Activity Manager contains the monthly/quarterly/annual practice management pages you need to manage your business:

- Qualified Prospect Evaluator
- Business Record
- Quarterly/Annual ScoreCards
- Client Pending / Case Open List
- Recommendation / Referral Tracker
- Recommendation & Referral List

These pages are self explanatory in nature and follow the client building and sales activity management process. We hope that you find these tools an effective way to manage your business.

QUALIFIED PROSPECT EVALUATOR

Name: _____

	NAME	Face or Phone Contact	Source	Age	Marital Status	Occupation Total Income (1000's)	Dependents?	Birth Dates (Y / N)	Life Insurance Owned? (Amt / Type)	Easily Seen? (Y / N)	Needs	Appt Date	Follow-up Plan	Transferred to Case Open List
1														
2														
3														
4														
5														

CLIENT PENDING / CASE OPEN LIST

Name: _____

	Date Case Opened	Qualified Prospect #	PROSPECT / CLIENT	Referrer Jt. Partner	Phone	Forecast (FYC / Prem)	Comments	Closing Interview Scheduled	IMPORTANT DATES				Transferred to Business Record
									Fact Finder	Written	Submitted	Issues	
1													
2													
3													
4													
5													

BUSINESS RECORD

Time Period: _____

Date Written (Mo/Day)	CLIENT NAME	INITIALS Ref by Jt. Partner	Source	*Product(s) Sold	SUBMITTED BUSINESS					With Check	PAID BUSINESS			REFERRALS	
					Date	FYC / Comm.	Premium	GDC	**Trans. Type		Date	Amount	MDRT Credit	Number Obtained	Posted to Tracker
1.															
2.															
3.															
4.															

RECOMMENDATION / REFERRAL TRACKER

Referred By	Name of Referral	Phone	Contacted by Referrer (Y / N)	Letter or Card Sent	Date Called	Appt. Set (Y / N)	Referrer Updated (Y / N)
1.							
2.							
3.							
4.							
5.							

1ST QUARTER SCORECARD

AGENT: _____ MGR. _____

Reporting Period	Dials (1)	Reached (1)	Appts. Set (1)	Appts. Made	Appts. Kept	Referral Attempts	Referrals Obtained	New Sees	Business Meals (1)	Qualified Suspects (5)	Fact Finders (1)	Cases Open (1)	Closes (1)	Total Points	Buying Entities	New Clients	SUBMITTED BUSINESS				PAID FOR BUSINESS				MDRT Credits
																	Products Sold		FYC / Premium / Revenue		FYC / Premium / Revenue		MDRT Credits		
																	Insurance Apps	Investment Products	Insurance	Investment Products	Insurance	Investment Products	Insurance	Investment Products	
BENCHMARK																									
Week 1 <small>Days Worked</small>																									
Week 2																									
Week 3																									

RECOMMENDATION AND REFERRAL LIST

NAME OF PERSON REFERRING: _____ Date: ____/____/____

"As you know, we believe the best way to build a business is through relationships, referrals and that 'you reap what you sow'. We are hoping you will provide three referrals, three friends or business associates that you think might benefit from doing business with someone they can trust for the type of financial services that I provide."

ScoreKeeping Guidelines

DAILY:

1. Keep Your Goals in the Forefront – As you begin each day, and periodically throughout the day, scan your goals which are across the top of each calendar page, as well as the inspirational quotes. This helps keep motivation high, while resisting negativity and the seemingly endless distractions of the day.
2. Focus on High-payoff Activities – Do what you must first throughout the day. Seize the day...but with the week in mind. When you are at work, be at work, so that when you're home, you can be at home.
3. Keep Score Daily – Using the grids across the bottom, keep score and give yourself credit. Remember, "What gets measured tends to get done and improve."
4. Use your Schedule Wisely – Respect your time by wasting as little as possible and stick to your Model Week.
5. Before retiring, post and prioritize – At the end of each day, tally your results in the daily grids and prioritize tomorrow's goals. Remember, your subconscious never sleeps and often you'll awaken with the answers and motivation you were searching for.
6. Keep your Qualified Prospect Evaluator, Case Open List, Business Records & Recommendation/Referral Tracker, Recommendations & Referral List current – This should be done each day/week.

WEEKLY:

1. Keeping Score Daily/Weekly Results – Add up your daily scores and write them in the total columns at the bottom and to the right of the scorekeeping grids.
2. Review Progress – Review how you are doing against your goals. Remember the sage advice from the Kinder Brothers, "Measure and monitor what matters most."
3. PEP/One-on-one Coaching – Meet with your manager and ask them to help you refine your skills. Be sure to bring your planner and any tracking reports to your coaching session.

MONTHLY:

Throughout the month, you need to take time to work on your business, as well as in your business. By that we mean, you need to perform the necessary activities, but you also need to collect information along the way so that you can analyze and strategize on ways to get better.

1. Keep Score – Update your daily/weekly results and enter them on your Monthly/Quarterly ScoreCard so you can review your results monthly and other and other frequencies.
2. Review Last Month's Goal vs. Actual Performance – Stop and reflect on the last month. What's going well? What are your opportunities for improvement? What kinds of things can you do to improve?
3. Update Recommendations/Referrals & Case Open Lists – Record or check the status of all prospects and open cases. This becomes your "Hot List" of cases to be developed or closed during the upcoming month, which will initiate your contact call list. Record these in the daily "Will Do's" sections of the upcoming month.

4. Update Business Record – Using the section in the back, post all business submitted, issued and paid throughout the month, as well as business-in-transfer. Be sure to track MDRT credits
5. Prepare for PEP/One-on-one Coaching and Sales Team Meeting – Bring your planner and any tracking reports to review your results in detail with your manager.
6. Review Recommendation/Referral Tracker & Referral Scripts – Recommendations/Referrals and personal introductions are the life blood of a successful financial services practice. Review your existing list (inventory) of referrals. Check the quantity and quality of your existing referrals. Determine how many of these you will call each day and record this goal in the “Will Do’s” sections. This is also the time to review your list of names that you are going to suggest to prospects and clients to help prompt their referral efforts. An example might be a roster of Associates in a law firm or a list of company officers. This is also an excellent time to review your referral language. Are you comfortable with the content? Have you mastered it?
7. Complete Mileage & Expense Reports – No business achieves its full potential without good financial records. The mileage and expense form in the back of the Sales Activity Manager can help keep you profitable. (The master copy in the back is meant for copying. We recommend you affix receipts to each month’s report and store them separately.)

Miscellaneous Tips:

- Review Quality of Prospects – It is highly advisable to have an identified clear profile of both your ideal client and the minimum standards required to qualify as a new client in your practice. Review these two profiles and see if the quantity and quality of your prospects measure up.
- Review Centers of Influence & Strategic Alliance Lists – One way of upgrading your clientele is to systematically work on developing Centers of Influence (C.O.I.) who can refer you “up” to markets with greater potential. These are often Attorneys, Accountants, Trust Officers or influential business people. Review the quantity and quality of your list. Your Monthly Work Plan should include further identification and contact. Use your “Will Do’s” sections to prompt your contact.

Our company philosophy is “Activities Produce Results, and if you want to accomplish your goal of greater results, you need only improve the quality and quantity of your activities.” This is the Law of the Farmer, “We reap what we sow,” and it applies to every aspect of our life. The Sales Activity Manager™ helps you to stay focused on those precise activities that you can control and that ultimately drive your business. Here is a summary of the four-step process we have described in this guide.

1. **FOCUS** *on what you want and why*
2. **PLAN** *on how to get there*
3. **EXECUTE** *on the plan's high-payoff activities and*
4. **MAINTAIN** *the process and progress over time with regular reviews*



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P R O M I S E

Seven Top Reasons to be in the Financial Services Industry

Population

The U.S. population is living longer and growing at the rate of 2.5 million per year.

Retention

The industry values retention and provides supportive tools and systems.

Opportunity

The opportunity to accumulate wealth and help others is abundant.

Mentoring

Our industry is built on mentoring and helping each other succeed.

Insurance

The "I" word is back in vogue and more important than ever.

Stability

Financial services products are needed during all economic times.

Entrepreneurship

The entrepreneurial spirit and freedom to be your own boss is alive and well.