STRATEGIC LIFE INSURANCE ANALYSIS

Required Information & Process

Designed for cases of $5000 and up of annual premium and/or $25,000 rollover.

REQUIRED INFORMATION FROM ADVISOR/AGENT

* **Complete client discovery to determine overall objective of coverage, premium budget & general medical information.**
* **MarketShare Financial® will provide you with the In-Force Authorization Form for completion and client signature.**

PROCESS & TIMELINE

Step	Description	Timeline
1	Once forms are completed, the advisor or assistant sends the forms to MarketShare Financial via e-mail. fax, or mail.	1 to 2 Business Days
2	MarketShare Financial will order the current policy data and inforce illustrations from the current carrier.	1 Business Day
3	MarketShare Financial will notify the advisor of the expected turnaround time to receive the illustrations to set proper expectations. (Carrier processing times vary.)	2 to 45 Business Days
4	Once ledgers are received, we review the illustrations with the advisor to make sure our report aligns with the clients' objective.	1 Business Day
5	The Strategic Life Insurance Analysis is completed by MarketShare Financial.	2 to 3 Business Days
6	Advisor / Agent presents findings to the client. MarketShare Financial is available to help present to the client via phone, MSF Live, or in person, if appropriate.	Total Average Timeline 21 Business Days

MarketShare Financial

Please contact your ***MarketShare Marketing Team*** for additional information.

800.421.8260

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