



AIMCOR
Enterprise Insurance Group



**CREATIVE.
CONSISTENT.
COMPLIANT.**

THE B2B INSURANCE PLATFORM...REDEFINED



REDEFINED

NATIONAL ENGAGEMENT. LOCAL SUPPORT.

A RESOURCE BUILT SPECIFICALLY FOR B2B DISTRIBUTION:
INSURANCE REVENUE WITHOUT THE INVESTMENT.

You may not have thought a lot about how to make insurance a larger part of your business, since tight budgets, wrong timing, advisor resistance, or competing priorities may have gotten in the way.

Adding Insurance Planning to your service offerings is nothing new. But the way AimcoR Enterprise Insurance Group (EIG) helps you and your advisors deliver it, is.

We want you to become more to your clients. We know that in order to get more of your advisors engaged in insurance, we need to do it in a way that is creative, consistent, and compliant. That's where AimcoR EIG can help by generating additional revenue for your firm through insurance at **no incremental expense.**

COMMITTED TO YOU AND YOUR ADVISORS.

We believe driving insurance adoption in your firm begins with educating your advisors on how to approach their clients and teaching them how to introduce insurance as a key component of comprehensive financial planning. We do this by engaging on a national scale, while delivering local support. It's also about helping you make the most of an opportunity that has the potential to significantly grow your organization's revenue. That is what we can help you accomplish, every step of the way.

ONE UNIT WITH A WIDE REACH.

AimcoR EIG is one interconnected unit with 18 regional offices, 50+ wholesale/development professionals, and 200+ employees. We are professional, prepared, and proud to be one of the fastest growing institutional distribution organizations in the country.

*We are ready to show you how to offer more.
Your clients are ready.
The question is, are you?*



OUR GOAL: TO SECURE YOUR ADVISORS' RELEVANCE & CLIENT RETENTION

STATISTICS SHOW...70% OF ADVISORS EXPERIENCE A CLIENT ATTRITION RATE THAT EXCEEDS 15% A YEAR. AND, HOW ABOUT THIS PAINFUL FIGURE...ONLY 4% OF ADVISORS RETAIN ASSETS INTO THE NEXT GENERATION.

As consumers have turned to online resources for cost savings and seemingly better ways to manage their own portfolios, advisors have struggled to **maintain** their practices. That's right, **maintain**, not **grow**.

Until clients begin to view their advisors as assets, rather than expenses, the kind of growth seen decades ago is history. One way to increase the value you offer your clients is to become their most trusted source for all of their financial planning decisions—including insurance.

The 'stickiness' of an insurance transaction virtually guarantees your advisors an automatic introduction to the surviving spouse or next generation, making it easier to retain existing and gather new assets.

Are enough of your advisors offering insurance to their clients? If not, you are missing out not only on potential revenue, but your advisors are putting themselves in a position to lose the trust of their clients by falling short in terms of offerings. **AimcoR EIG can help.**

OUR MISSION:

TO BECOME YOUR #1 TRUSTED RESOURCE FOR GROWING INSURANCE REVENUE.

We are narrow in our focus, selective in our alignments, and deep in our relationships. What does this mean for you? More dedicated resources, more personalized, concierge-level service, and better results. We recognize that the institution owns their advisors and clients, and ultimately directs that relationship. Our client is **you**, the institution, and our goal is to create a platform that allows you to offer insurance services while better supporting your advisors.

OUR VISION:

TO BE THE LEADING B2B PARTNER AT DRIVING INSURANCE PLANNING ADVISOR ADOPTION.

Generally, the industry focuses on improving insurance sales for the 30% of advisors who are already selling it. Our approach is to engage with **all** of your advisors by introducing them to insurance planning, increasing their comfort level, and assisting them in offering this additional service to their clients without compromising time spent on their core competencies. With our personalized and localized process, we can move the needle in the right direction, and our **people** can deliver robust support that redefines the true potential of insurance distribution.



OUR **THREE** CRITICAL ATTRIBUTES: **CREATIVE. CONSISTENT. COMPLIANT.**

HOW WE ENGAGE, INTEGRATE, AND SERVICE.

AimcoR EIG is **creative** in how we educate advisors to incorporate insurance into the planning process. We learn your financial planning software and identify opportunities for advisors. Instead of complicating the process, we offer A to Z, turn-key solutions and operate in the capacity which you and the advisor find most comfortable.

As your single-point resource, our primary objective is to integrate and service the institution and the advisor in a **compliant** manner. We collaborate with your compliance department to ensure that the appropriate ideas and solutions are presented to your advisors and their clients.

AimcoR EIG has a strong national presence. Your advisor population is aligned with our 18 individual locations in order to develop personal relationships, locally, with the team that handles their business. Each AimcoR EIG

office maintains a full sales staff capable of working jointly with your advisors and their clients, followed by concierge-level operational support and service. All of this is done under **consistent** rules of engagement on a national basis, with single-point, centralized relationship management and reporting provided at the AimcoR EIG corporate level.

Additionally, we are the first B2B initiative to offer in-force management solutions that allow us to proactively provide service after the sale while also ensuring you and your advisors are meeting fiduciary responsibility to clients.

Last but not least, our relationship with insurance companies allows us to be an effective, bold advocate for you, your advisors, and their clients.





WHAT MAKES
 **AIMCOR**
Enterprise Insurance Group
DIFFERENT?

OUR SIX DIFFERENTIATORS

- No-incremental-cost insurance partner
- Local provider with national reach
- Independently owned and selective in our alignments
- Single point for support, expertise, innovation, and technology
- Carrier neutral; 100% client driven
- Integrated into your system

AimcoR Group is a leading national insurance marketing organization consisting of 45 independent member companies that focus on distributing and servicing insurance and retirement products through independent financial advisors, broker-dealers, property and casualty firms, banks, and direct-to-consumer marketers.

The AimcoR EIG carrier portfolio is one of the most comprehensive in the industry. We realize that providing access to top carriers and products is critical to your success. We deliver this, but you gain additional confidence knowing we have established relationships inside these carrier partners.

AimcoR Group 45 Member Firms
AimcoR EIG
18 Regional Offices

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