



STEP 1 Determine Your Service Model

A) Traditional Brokerage:

The Cason Group will process the cases you submit on your own.

B) Business Development Support:

Uncovering opportunities with new and existing clients.

- Targeted case studies
- In-force policy reviews

C) The Cason Group works with you and the client directly, on your behalf, to execute insurance strategies.

In choosing the Option "C" model, we conduct all analysis, application paperwork and follow-up needs with your client, while staying in full communication with you.

Helping Advisors Grow their Business

STEP 2 Objective Approach to Case Design

- Client needs analysis
- Carrier research and due diligence
- Advanced case design
- Product comparisons
- In-force policy audits
- Pre-underwriting with competitive quotes for best tentative offers
- Preparing the case for submittal (i.e., advisor appointment and licensing, application packet)
- Traditional paper vs. e-Application submittal

STEP 3 Application Submission and Underwriting

- Submit completed application to: EmailedCases@thecasongroup.com or complete e-application via iGO
- We review applications to reduce inefficiencies and delays
- We order medical records and exams as needed on your behalf
- Status is sent out at least weekly depending on case status
- Working with underwriters to negotiate the most competitive offers and issue a policy that best suits your client
- Policy service and support

STEP 4 Ongoing Engagement with You

Regular Cultivation Visits and Business Development Meetings

- Marketplace updates
- Uncovering additional opportunities
- Point of sale support

Training Sessions and Webinars for You and Your Staff

- Product, process, and concept training sessions and webinars for you and your staff
- Study groups & best practice sessions