



LIFE & ANNUITY IMO SINCE 1972

# Levinson & Associates

## AMERILIFE®

# Life, Health & Annuity Expo and Symposium

## Friday April 17<sup>th</sup>, 2026



















PAPERLESS SOLUTIONS GROUP®  
An MIB Business



# 18TH ANNUAL BIGGER & BETTER

# #STACKTHEBRICKSIN26



# EXPO INTRO VIDEO

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# Where Are We Today?

- **Our Growth:** New record as far as premium, pending apps, number of agents & employees since 1972!
- **Record Year/Giving back:** Toys for tots, American cancer society & Feeding America donations on behalf our staff & agents!
- **Powerhouse Partnership w/AmeriLife since October 25'**: Giving us the resources, tech, back-office support, exclusive products & platforms, aside from being the largest Senior Health distributor in the world since 1970!
- **1 Stop Shop:** Now covering all 3 bases, Life, Senior Health & Annuity, allowing our agents to cross sell/cross market all with the same great company now offering the latest tools, AI platforms, & exclusive carrier product access!
- **Top 10 IMO:** Levinson was rated #1 in support by our agents, with the most 5-star reviews

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# Where Is The Industry Today?

- **New records set:** The industry has more Licensed agents, Life Premium & Annuity Sales. More agents are selling and more people are buying!
- **The best Kept Secret is out!** Tony Robbins and Grant Cardone are marketing Life Insurance & Annuities now.
- **The word is out!** Technology, the Internet, and social media changed this industry at lightning speed (Consumers, Carriers & Distribution). Think back 20 years, it was a completely different industry.
- **Real Estate agents are now getting insurance licensed!** The Real Estate industry is being disrupted. (TruDeals Realty Example charging .50 vs 6% Fees)
- **Our industry is not affected by these disruptions.....** in fact, it's the complete opposite! There's a reason why Private Equity is so involved in our industry now! Very profitable, Stability & Consumer Demand! Now is the best time for all of us!

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# What's In It For Me?

The goal is simple.....

## New Strategies To Stack The Bricks In 26!

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# Strategy #1: What Is Your Gift?

- Write this down now.. **What is your Gift?**
- Personality, Courses, golfing, podcast, cooking classes, etc., anything to create followers, period. (we all have something)
- **My Challenge to you:** make a 2-3min video about your gift and spend \$100 to boost the ad on Meta. (My Own Experiment)
- **Don't underestimate social media/interest media:** You should be posting weekly on all 4 platforms! The best part is... It's free!



# Strategy #2: YouTube & Podcasts

- **YouTube & Podcasts** are the largest social media platforms now, especially with the younger generation, and we can all get started now!
- **Example: Agent Brandt** in the audience posted a life insurance 101 YouTube video that generated over 250 views and just 1 comment led to a \$5mil application a few weeks ago.
- **New Challenge**: I recommend dedicating 20% of your time to marketing content this year.



# Strategy #3: Leveraging AI

- Who has used AI in insurance sales and/or marketing yet?
- Who has searched on Google and clicked AI assist for better results?
- Who actually uses an AI assistant? (Gemini, Claude, etc.)
- I spoke about AI last year and now it's taking over admin. and marketing as we speak!  
(I-Genius Marketing Lab Example)
- **Solution:** Our New AI marketing Tool will save you time!



# Strategy #4: Cross Buying & Selling

- More consumers are cross-buying, and agents need to be cross-selling/marketing to meet these consumer demands! \*Consumers are more educated due to AI, Searches & online research. You must be doing the same!
- **Example: Think Like Costco!** “The 1 Stop Shop” Agents can Sell/Market Life, Health & Annuities, which creates raving fans that keep coming back!
- **Takeaway:** You are the new Costco covering all 3 bases!



# Social Media Marketing Is Changing The Game For Everyone!

BOOSTED



8:46 5G 34

Insights

Reel Ad: March 27 at 8:20 AM

**For All Life, Health & Annuity In...**  
February 18 · Duration 1:12

240 0 4 4

Insights include data from your reel and any ads.

**Overview** ⓘ

Views	24,865
Interactions	255
Profile activity	70



8:47 5G+ 34

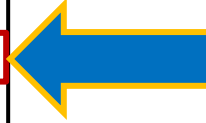
Reel insights

**Episode #55 w/Annuity Coach Chris! 2...**  
March 31 · Duration 2:31

21 0 1 1 0

**Overview** ⓘ

Views	491
Instagram	327
Facebook	164
Watch time	34m 53s
Interactions	20
Profile activity	1

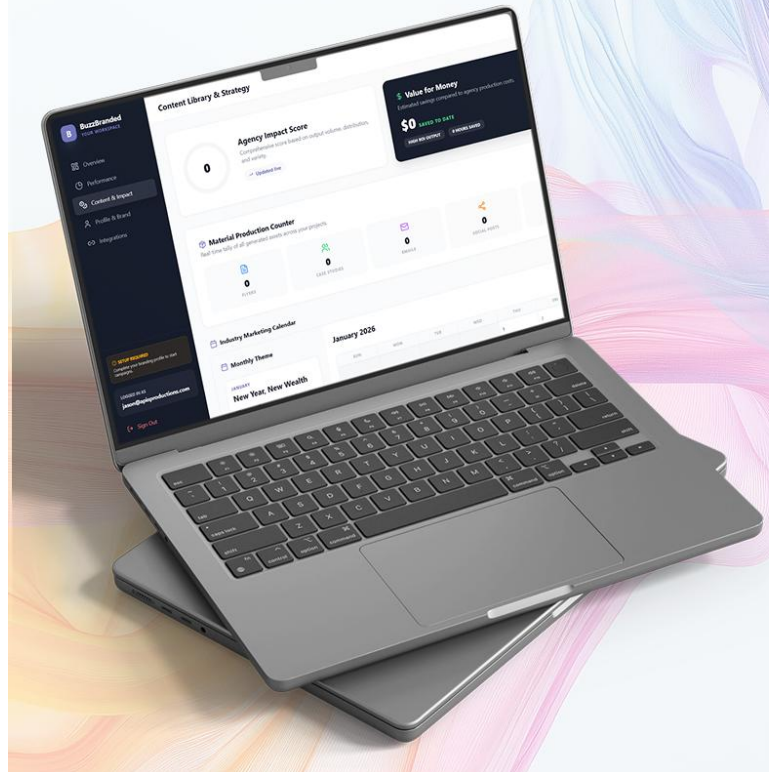


Don't Forget the \$100 Challenge!

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Whether you're an agent with no marketing experience at all, or an agency owner looking to streamline process and costs, I-Genius Lab let's you turn any message into marketing for your clients and peers.



## The Content Engine Built for Insurance

I-Genius Lab creates branded marketing assets for you to share with your audience!

You feed I-Genius Lab an article you read, any document, or any idea on insurance and I-Genius Lab leverages AI to create:

- Social Posts 
- One-Page Flyers 
- Email Campaigns & Newsletters 
- Case Studies 

I-Genius Lab integrates with a variety of marketing platforms and tools to give agents a single hub integrated with AI support to execute nuanced marketing that supports any type of insurance product or campaign.

I-Genius Lab creates assets you can schedule to share with the press of a button!



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- Try before you buy! Get 3 complimentary campaigns to get started!
- The Lab uses up-to-the-minute AI to give you a unique and attractive brand presence and voice!
- Subscribers get up to 40 campaigns per month!
- All campaigns and materials can be saved and stored for later use!
- Future software upgrades will be complimentary as the program expands its capabilities!
- The Lab's reporting system supports success by dashboarding results and highlighting what's working for you!
- Generate AI-powered flyers, emails, SMS texts, Social Media Campaigns and more!
- The Lab integrates with all major marketing tools including Mail Chimp, Constant Contact, & more!
- Once you've uploaded a graphic, the Lab's AI takes over, creating variations of your design for social, email, & more!
- The Content Engine Built for Insurance: The Lab's AI is tuned to build the kind of content you need to sell policies!

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# LUMA: Life & Annuity Software Platform Launch!

## Life Insurance & Annuity Business

POWERED BY LUMA

### A Unified, End-to-End Ecosystem that Redefines Distribution

Luma Financial Technologies is a global, independent technology provider transforming the way life insurance is distributed and managed. As the first in the industry to unify life insurance and annuities in one connected ecosystem, we are setting a new standard for distribution.

Building on our award-winning annuity capabilities, we have expanded into life insurance with the same proven infrastructure that reduces complexity and eliminates inefficiencies. By connecting insurance solutions in a single environment, firms can leverage existing integrations, permissions, and training to expand seamlessly, resulting in a unified advisor experience that streamlines workflows, enables cross-sell opportunities, and delivers greater client value.



### Gain Full Visibility, Streamline Workflows, and Deepen Trust



#### Oversight & Control

Full visibility across life and annuity products equips firms with stronger oversight, reduced risk exposure, and the ability to act decisively with real-time data at their fingertips.



#### Efficiency & Results

Integrated quoting, applications, and servicing reduce NIGO rates, cut processing times, and simplify workflows all without adding headcount. Firms gain scalable operational efficiency that drives faster revenue recognition.



#### Trust & Retention

A seamless, transparent experience across life and annuities deepens trust, increases placement success, and supports stronger long-term relationships between firms, advisors, and clients.

## 100% Complimentary!

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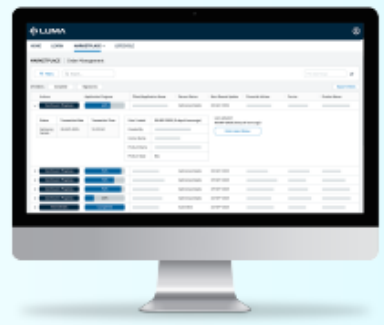


# LUMA Solutions That Power Life Insurance Growth



## Product Marketplace

- ✓ Search, compare, and quote life insurance products from top carriers, giving advisors faster access to the right solutions.
- ✓ Custom quote design tailored for protection, accumulation, or long-term care, so financial professionals can meet diverse client needs.
- ✓ Integrated electronic application submission, which reduces NIGO statuses and accelerates case turnaround.



## Lifecycle Manager

- ✓ Full visibility across all life insurance policies regardless of carrier or order entry system, improving oversight and compliance.
- ✓ Create custom views, export data, and track activity, enabling back-office efficiency and better decision-making.
- ✓ Automated alerts on client policy events such as surrenders and withdrawals, allowing proactive service and reducing risk.

## Learning Center

- ✓ Access educational content and resources so advisors can serve clients with greater confidence.
- ✓ Carrier NAIC product training and marketing collateral, streamlining compliance and advisor readiness.
- ✓ Robust library of educational videos, designed to accelerate adoption and support ongoing advisor development.



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POWERED BY AGENT LEAD LAB

# Levinson Agency Leads

Text-Verified Leads For Agents And Agencies.

### FRESH LEADS

#### TEXT-VERIFIED FINAL EXPENSE LEADS \$30/LEAD

- ▶ Minimum Order: 25 leads
- ▶ Data Fields: Name | Phone | Email | State | Age | Beneficiary
- ▶ Americans (20-85) seeking affordable final expense coverage
- ▶ Average Commission Paid \$600-\$1,000 · Close ≈ 2-6 for every 25 leads

### FRESH LEADS

#### TEXT-VERIFIED VETERAN LEADS \$33/LEAD

- ▶ Minimum Order: 25 leads
- ▶ Data Fields: Name | Phone | Email | State | Age | Beneficiary | Branch of Service
- ▶ Former & active veterans (20-85) looking for better rates than VA coverage
- ▶ Average Commission Paid \$1,000-\$2,000 · Close ≈ 2-6 for every 25 leads

### FRESH LEADS

#### TEXT-VERIFIED IUL LEADS \$43/LEAD

- ▶ Minimum Order: 25 leads
- ▶ Data Fields: Name | Phone | Email | State | Age | Beneficiary
- ▶ Americans (20-85) seeking affordable final expense coverage
- ▶ Average Commission Paid \$600-\$1,000 · Close ≈ 2-6 for every 25 leads

### FRESH LEADS

#### TEXT-VERIFIED MORTGAGE PROTECTION \$53/LEAD

- ▶ Minimum Order: 25 leads
- ▶ Data Fields: Name | Phone | Email | State | Remaining Mortgage Balance | Age | Reason For Wanting Coverage
- ▶ Homeowners (20-85) Seeking Mortgage Protection Coverage
- ▶ Average Commission Paid \$1,000-\$2,000 · Close ≈ 2-6 for every 25 leads

### FRESH LEADS

#### ANNUITY LEADS \$98/LEAD

- ▶ Minimum Order: 25 leads
- ▶ Data Fields: Name | Phone | Email | State | Age | Savings Amount | Retirement Timeline | Engagement Stage | Why They Want Annuity Coverage | Potential Objections
- ▶ (20-85) Retirees and pre-retirees actively seeking annuity solutions for guaranteed income
- ▶ Average Commission Paid \$1,200-\$3,600 · Close ≈ 2-3 for every 25 leads

### AGED LEADS

#### AGED FINAL EXPENSE LEADS \$2.50/LEAD

- ▶ 30-90 Days Old
- ▶ Data Fields: Name | Phone | Email | State | Age | Beneficiary
- ▶ Seniors 40-85 who requested Final Expense quotes within 1-3 months (non-state regulated)
- ▶ Average Commission Paid \$600-\$1,000 · Close ≈ 2-6 for every 25 leads

### FRESH LEADS

#### Text-Verified Final Expense Leads

~~\$32~~ **\$30**/lead

- Minimum Order: 25 leads
- Data Fields: Name | Phone | Email | State | Age | Beneficiary
- Americans (20-85) seeking affordable final expense coverage
- Average Commission Paid \$600-\$1,000 · Close ≈ 2-6 for every 25 leads

Name

Phone Number

Email

State

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## In-House Senior Health Insurance Department!

*The moment you have been waiting for has finally arrived! Introducing our new In-House Senior Health Department! We have you covered with all of the top carriers, products, and tools in the industry! Work directly with our Marketing Specialists who are trained to help you achieve results!*

**Top Carriers Include:**

**Paul Caesar**  
 Health Department Vice President  
 800-375-2279 EXT 280  
[paul@carylevinson.com](mailto:paul@carylevinson.com)

**Andre Pearson**  
 Health Department Specialist  
 800-375-2279 EXT 290  
[andre@carylevinson.com](mailto:andre@carylevinson.com)

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## In-House Senior Health Insurance Department!

***With Levinson & Associates, our agents can take advantage of Tech Platforms, Tools, & Lead Programs!***

**LeadStar Exclusive In-bound & Live Transfer Lead Program!**



**SunFire Quoting, E-apps & Enrollment Software!**



**"Medicare Express" In-Person Meetings Booked Just For You!**



**"LeadingResponse" In-Person Seminar Marketing Packages!**



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### Marketing

**The i-Genius Playbook**  
Life Insurance Simplified!

Levinson Agents utilize the "i-Genius" Turn-Key Sales Platform to elevate their practice to the next level without any out-of-pocket cost.

Please scroll down to learn more\*  
\*You must be logged in to levinsonandassociates.com to access all "more info" buttons.

- AGENT TESTIMONIALS**  
See what other agents are saying about working with Levinson & Associates  
[more info](#)
- FAMILY OWNED & OPERATED SINCE 1972**  
Four siblings, insurance and goals to help build upon the relationships we've already enjoy with our agents.  
[more info](#)
- Full-Back Office Support**  
Including call centers and levinsonandassociates.com  
[more info](#)
- Free Annual Agent Expo**  
Learn from top industry leaders and agents from across the country.  
[more info](#)

Scan bar code below for more details



### New Business

**THE LEVINSON NEW BUSINESS AND CASE MANAGEMENT PLAYBOOK**

**STEP 1**

Submit your New Business in one of the following ways:

- iGenius E-Applications and Drop Tickets right from [levinsonandassociates.com](http://levinsonandassociates.com) or the Levinson Mobile App
- Fax to (541) 740-1925
- Email to [applicants@levinson.com](mailto:applicants@levinson.com)
- Paper application mailed to us at: [Levinson@Associates.com](mailto:Levinson@Associates.com), 5555 N. University Dr., Suite 200, Clatskanie, OR 97107

You will be notified that the application has been received same day.

**STEP 2**

Our Case Management staff will scrub your application within 24 hours of receiving and work with our contracting team to make sure the application is in good order for submission. If you have not yet completed the required appointment forms and/or carrier training you will be notified immediately with details on what is required to submit your application.

You are notified of any missing items prior to submission including any outstanding requirements. Once the application is processed and in good order, we will order the exam for you. If one is needed or, if you would like to use an existing exam company, you are more than welcome to do so. Please notify our Case Management staff if you would like to order required exams.

**STEP 3**

Our Case Management staff will follow up every 2-5 business days to ensure that your case is being processed as quickly as possible.

### Contracting

**Contracting with Levinson & Associates 101**

Levinson & Associates uses an electronic licensing platform to streamline your contracting experience.

**\*\*If you are a new agent to Levinson & Associates, please [Click Here](#) to complete the registration and onboarding.\*\***

**Step 1** The first step is knowing where to find the request forms for the contracting links

- Log-in to the [LevinsonandAssociates.com](http://LevinsonandAssociates.com)
- Click on Contracting below

If you are a new agent and not onboarded with Levinson & Associates, click on **New Agents** below.

**CONTRACTING / ONLINE LICENSING / APPOINTMENTS**

If you have already completed your onboarding process, you can request contracting from the following options below.

**Step 2** Important links to know prior to submitting contracting and new business

The first important detail to consider is whether or not you have the licenses. Some carriers require that you have had one year to submit before we can start you the contracting link. In these cases, we need to have the link ready to receive. Please let us know if you have already submitted this business to us. Then we submit your business to [gen@lva.com](mailto:gen@lva.com)

To view our Appointment Requirements Guide, [Click Here](#)

Cancel the Appointment from the [Click Here](#)

For more information on the Levinson & Associates Document P & O Coverage, [Click Here](#)



Scan The QR Code To Download!



Visit our new & improved website to view and download our playbooks today!

[www.levinsonandassociates.com](http://www.levinsonandassociates.com)

800-375-2279

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## NCD: New Carrier Launch On “Insure Me Now Direct!”



- Backed by 8,000+ 5-star reviews from clients and agents!
- Dental plans on the MetLife network with up to \$10,000 in annual max covering implants, crowns, and more!
- A custom standalone vision plan backed by VSP that is rich in benefit including a \$50 copay for progressive lenses!
- Accident Medical Expense products with up to \$15,000 in coverage, paid out per accident, no deductibles, and pays your client directly!
- **Commissions that pay for the life of the policy - that's right! Renewals never go down!**
- No major-service waiting periods: Immediate coverage for crowns, implants, and more in most states!

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## What's New With..... insuremenowdirect



- NCD Launched On the Platform as of April 2026!
- Manhattan Life is launching 3 new products to IMND this month! Hospital Indemnity Select, Home Health Care Select, and **Secure Advantage Final Expense!**
- Assurity Life introduced a new Long Term DI Plan with benefits up to \$30K per month!



**ManhattanLife**<sup>™</sup>

*Standing By You. Since 1850.*

**Assurity**<sup>®</sup>

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# Practice Building & Legacy

*Turning Production  
Into Long-Term Value*

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**AMERILIFE®**

*Bill Levinson, Jason Levy, and Mike Vietri*

# If You Stopped Working Tomorrow... What Would Your Business Actually Be Worth?

Strong production does **not** automatically equal transferable value.



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# What We're Seeing **Across the Industry**

Production alone  
doesn't create  
enterprise value.

Many advisors  
producing at  
high levels

Few have  
intentionally built  
for transferability



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# This is **Not** About Exiting

- Not stepping away
- Not giving up control
- Not changing what you do today

# What this **is** about:

- Intentional practice building...  
**long-term value**



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# Growth + Structure = Legacy

**What partnership enables:**

Shared resources

Broader AmeriLife  
ecosystem

Advisors stay active, in  
control, and on their  
timeline

*“This isn’t about changing what you do.  
It’s about making sure what you’re building has value beyond you.”*



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*Bill Levinson, Jason Levy, and Mike Vietri*



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**Thank you!**

**Don't Forget Your Gift And Let's Stack The Bricks In 26!**

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