

LEADS AND MAILERS

Aged Lead Store

 **AGED LEAD STORE**

agedleadstore.com

Has an easy filtering tool to pull counts. Typically, doesn't have many annuity leads (which are often harder to generate) but does have many life insurance leads.

- **2-30 days. (\$1.25 a lead)**
- **31-85 days (\$1.00 a lead)**

The Annuity Leads



theannuityleads.com

Contact: Scott Brooks

scott@rollovercoach.com | 888.288.1712

\$200 a lead. No long-term contracts. Semi-territory based (they don't like to put too many agents in one particular area).

Leads sourced from national radio, TV, online, and direct mail campaigns.

Radio & TV average age is 64.

Online average age is 61.

Leads funneled out by Zip code (60-mile radius min, though they recommend 90-100 mile radius).

Lead Concepts



leadconcepts.com

Contact: Clay Davenport

clay@leadconcepts.com | 1.800.283.0187

Several of our agents have used this company before for mortgage protection mail pieces.

They also have annuity and life mailer programs as well.

Annuity Lead Mailers

- Annuity Card and Half fold are \$475 per thousand and pull 1-1.25%.
- Annuity Tri Fold are \$510 per thousand and pull 1-1.5% (The tri fold format tends to pull higher response in all markets).

It is a 3-week process to get lead orders processed and have lead returns.

For annuity leads, Lead Concepts recommends mailing Ages 60-75, with incomes 50k+ annually, and confirmed homeowner only.

Life Insurance Mailers

- Burial Life 1 2 3 Easy mailer pulls 1.4 - 1.6% and costs \$465.00 per 1000 mailers (Excellent Value - Offers no free guide)
- Burial Life Walmart Card with private return pulls 1.75 - 2.3% and cost 485.00 per 1000
- Burial Life Letter mailer pulls 1.2 - 1.4% and costs \$495.00 per 1000 mailers (Offers free Memorial Guide)

It is a 3-week process to get lead orders processed and have lead returns.

Benepath



benepath.net

Contact: Melissa Eglinton

melissa@benepath.net | 484.218.0301

Benepath offers a variety of leads along different channels, including Medicare Supplement, Life/Final Expense, Individual Health, Group Health, and More. Most of our agents will be interested in the Medicare Supplement and the Life/Final Expense leads.

With regards to the Life/Final Expense program, lead flow is generally harder to produce, and the company recommends a statewide territory. Regarding Medicare Supplement, the lead flow will be higher.



Financialize.com
Contact: Marc Heberling

marc@financialize.com | (707) 590-2600 Cell (pdt)

Digital annuity lead vendor

They have two options: a territory option and an auction option. Leads that aren't picked up by territory go to the auction. Territories require a 5 lead / month commitment.

Several of our agents have had great luck with this to generate annuity leads. Results will, of course, depend on area, opening, and bid. But agents will have an opportunity to view key details before bidding.

Territory availability can be viewed by accessing the admin login.

<https://admin.financialize.com/>

U: Legacy_Financial

P: legfin2017

Jucebox



JUCEBOX

Juceboxny.com

Contact: Stephen Corcoran

stephen@juceboxny.com

Life insurance lead program with guarantees.

Your Investment

90 DAY PROGRAM with Risk Free Guarantee

OPTION 1 - Pay In Full Today

\$1900 x 3 mo

\$797 Setup Fee

\$6497

One Payment Today

Save \$503

OPTION 2 - 3 Payments

\$2000 First Payment

\$1000 Setup Fee

\$3000

Total Payment Today

Then 2 Pmts of \$2000

Exclusive Leads Get 75 - 150+ Leads Over Initial 3 Months

After Initial 90 Days...

Option 1

Month to Month

- 1 - Exclusive Leads
- 2 - CRM & Automation
- 3 - Support & Training
- ~ Average 33+ Leads Per Mo.
- ~ 1 Agent (Lead Agent)
- ~ 1 Campaign Territory

\$1900

Per Month

Option 2

Pre-Pay Another 90 Days

- 1 - Exclusive Leads
- 2 - CRM & Automation
- 3 - Support & Training
- ~ 100+ Leads over 90 days
- ~ 1 Agent (Lead Agent)
- ~ 1 Campaign Territory

\$5172

Paid In Full **Save 9%**

Option 3

Scale Up

Ready to scale?

- ~ 2-5x Leads over 90 Days
- ~ up to 5 Agents (Lead Agents)
- ~ up to 5 Campaign Territories
- ~ up to 5 Additional Users For Training & CRM (Sales Admins)

Quoted

Per Month

Datalot



datalot.com

Contact: Alberto Lopez

alopez@datalot.com | (855) DATALOT

Life insurance leads run the gamut but are generally banded out by age and health. This means that a lot of the leads will be for term or final expense but could be for a different product.

It's pretty much up to the agent to figure out their life insurance needs after that point.

They have three lanes for life and the bids for each lane will vary - basically \$35-45 for the first tier, higher age band, no health q's and \$65-75 for the rarer younger age band with health screening.

Since the lead flow is consumer driven, the leads tend to be for term or final expense, but the majority of the consumers coming in don't know too much about life insurance - just that they need some coverage. No contracts or commitments, but they do require a \$500 frontload. Statewide.

AdvisorWorld



advisorworld.com

Contact: Barbara Dunn

barb@advisorworld.com | 1.800.461.4085 ext. 102

Like many lead companies, they derive their leads from web landing pages related to annuities and financial products. Leads come in, their team qualifies leads and makes them available to agents. One nice thing they do is a warm transfer—priming the consumer on the agent in their area that will call them.

Leads are exclusive and \$300 a pop. They do not have subscription terms, though they do require a lead commitment of 5 leads per month.

Lead qualifications:

“Based on all of the leads that we qualify; the average invest size is approximately \$250K. We do see leads up to 1 mil. We qualify leads if they have a minimum of \$25K to invest and quite often agents find that leads that state this amount actually do have more.”

Consultation Packs



100% Done-For-You Consultation Scheduling

Choose any two topics (Taxes in Retirement, Estate Planning or 401(k)/IRA), make sure you have lots of availability on your calendar, and let White Glove do the rest.



Top of funnel leads

These highly qualified leads aren't shopping around. They're looking for expert advice. You position yourself as their go-to when they're ready to work with an advisor.



Time savings

Don't waste time trying to schedule meetings. White Glove's proprietary technology connects prospects directly with your availability.



Warm introductions

Opt to have our friendly Virtual Greeters provide a professional intro and tech support to kickstart your consultation.

\$100k+ in Assets	Type of Consultation	Details
\$99	Requested	Leads who want to meet, but can't during the times available on advisor's calendar
\$199	Booked	Leads that book a specific time on your calendar
\$299	Consultation Held	Leads that keep the appointment booked