

What will the advisor learn from this presentation?

In this presentation, the advisor will find out information about how a group managing general agency (GMGA) can help a life or financial advisor deliver more value to existing clients and attract new clients by enabling them to offer group products. Even group advisors can benefit from a GMGA relationship. Upon the conclusion of this segment, the advisor will have enhanced their financial and business planning skills that they can put to effective use immediately.

Presentation Overview

We will discuss how full support from plan marketing and plan offerings through renewals, advice, education, troubleshooting and back-office services facilitates obtaining, maintaining, and retaining clients. They are the tools advisors need to move their businesses to the next level. In addition, we will explore succession planning and various areas such as estate planning, wills and Powers of Attorneys and real-life examples to help solidify your business and those of your clients.