Welcome to a BGA with state-of-the-art technology that helps you better serve your clients & prospects

PINNEY INSURANCE AGENCY KIT 2024

Providing all the tools for your success

ADDRESS

2266 Lava Ridge Ct.

Roseville, CA 95661

PHONE

800-823-4852

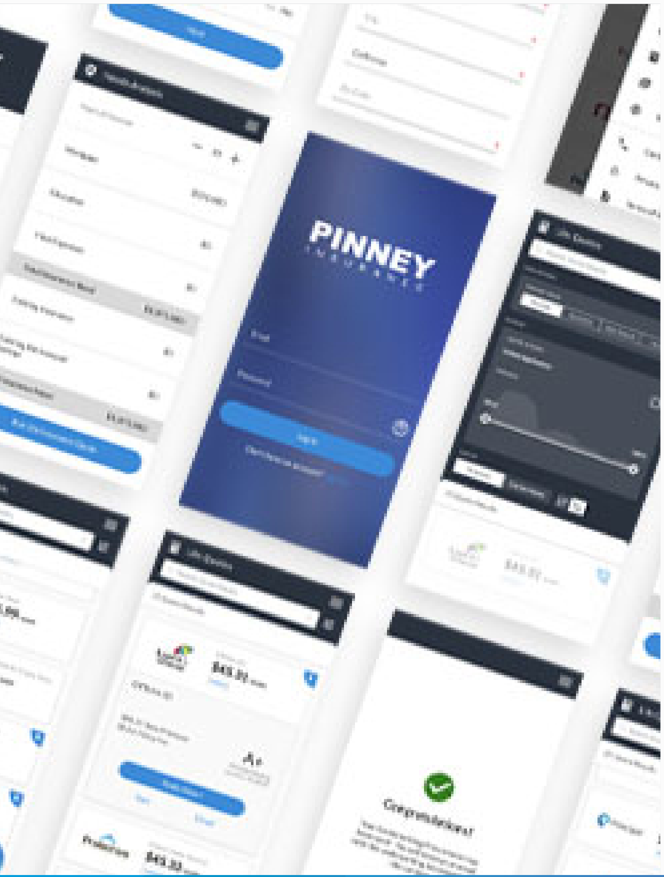
916-773-2800

WEBSITE

pinneyinsurance.com

ABOUT PINNEY

If you want to use technology to be more efficient, connect with clients digitally, and be part of a more diverse and accepting BGA, you're in the right place.



A DIFFERENT KIND OF BROKERAGE HOUSE

We started out as the R. Jan Pinney General Agency of Transamerica Occidental Life Insurance Company in 1972. Since our founding 50 years ago, we've expanded from a single-company agency to a national distributor headquartered in California, with team members working remotely throughout the country. Our focus on technology and digital-first sales strategies put us ahead of the curve in 2020. When the pandemic struck, it didn't change anything about the way we do business - in fact, our app fulfillment team had been doing remote client interviews with eApplications and eSignatures for more than 15 years. If you're motivated by the thought of using technology and online tools to sell more policies and better serve your clients, we'd love to hear from you.

- Representing over 60 leading carriers
- Complete support for life, annuity, long-term care & disability business with a focus on methods, strategies & concepts that grow revenue
- Affiliated with LIBRA Insurance, PLAN, NAIFA, MDRT, NAILBA, LIDMA and other industry organizations
- 100% digital: online quoting and conferencing, eTickets, ePolicy delivery, eApplications, eSignatures, TLS email encryption, and more

Our vision

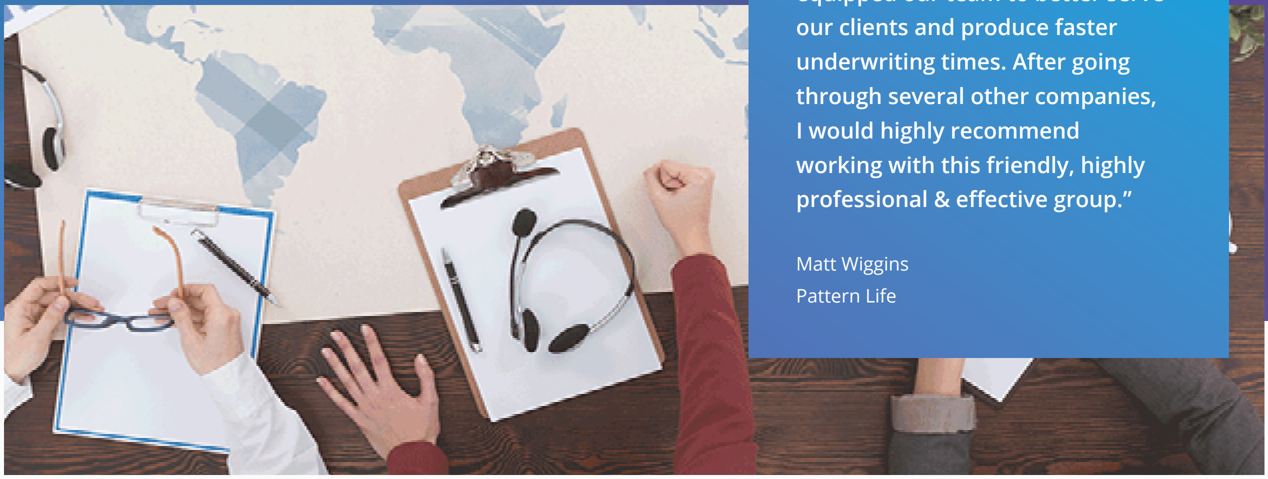
We treat our agents, advisors, and financial firms like partners in our business — we understand that they're vital to our success. Every interaction and transaction needs to be a win-win-win scenario, where you, your clients, and Pinney all enjoy and benefit from the experience. Our "Formula for Success" — our business motto — is based on this ideal: **"Have Fun + Value People = Make Money"**

AT THE FOREFRONT
OF TECHNOLOGY

Our industry is at a turning point. Consumers have changed how they shop for insurance, and it's our job to meet their needs. We offer you and your clients the latest technology, from eSignature to ePolicy Delivery. We're constantly updating our systems and tools with time-saving and groundbreaking technologies to make digital prospecting, selling, and processing insurance easier for you.

"We switched over to Pinney this year and have never looked back! Their product knowledge & underwriting experience has equipped our team to better serve our clients and produce faster underwriting times. After going through several other companies, I would highly recommend working with this friendly, highly professional & effective group."

Matt Wiggins
Pattern Life



MARKET YOURSELF EFFECTIVELY TO NEW LEADS & PROSPECTS

Technology has empowered the agents and BGAs that were ready to make the switch from a face-to-face model to a virtual one. When you offer tools like online quoting, eSignature, eApplication, and ePolicy Delivery, you empower your clients to take action now.

PROCESS BUSINESS FASTER & SPEND LESS TIME ON PAPERWORK

When you work with us, we'll call your clients as your assistant to complete and submit their applications, saving you time and effort. You sell, and we'll follow up with your clients to make sure your cases are processed quickly. You can get online status reports 24/7 and see what's happening with your cases in 2 easy clicks.

FOCUS ON DEVELOPING RELATIONSHIPS WITH NEW & CURRENT CLIENTS

Top producers don't have more hours in the day than you do – they've just figured out a better way to use them. Our CRM, Insureio, gives you their systematized, automated approach to selling, resulting in more sales, less paperwork, and happier clients.

WHAT WE OFFER

Good GAs are easy to find, but you want more than just another quote shop with good commissions. You want diversified products and online sales tools to give your clients the best possible options. You want proven marketing techniques that show you how to target, track, and retain your best clients.

Partner with us to get the technology and expertise you need to become a 21st century producer.

SALES SUPPORT

Work with experienced professionals who have been and continue to be in the trenches. Advanced planning specialties include wealth transfer, estate planning, trust reviews, IRA/annuity max, and more.

UNDERWRITING EXPERTISE

With full support from an in-house underwriter and on-staff medical doctor, our team will help you present positive underwriting scenarios that give your clients the best chance of favorable offers.

CARRIERS & COMMISSIONS

We offer top commissions from the most competitive companies. Our online contracting system will get you appointed with all of our 60+ carriers, saving you time and effort.

APPLICATION FULFILLMENT

Our agents & application specialists conduct phone interviews & schedule exams on your behalf. You get comprehensive case management throughout the process until that policy is in place.

REFERRAL OPTIONS

This hands-off sales process lets you refer clients to our team of agents licensed in all 50 states who qualify the client, make the sale, and complete the application on your behalf.

EMERGING TECHNOLOGY

Our products, systems, and technology give you the tools you need to do more in less time. Together with Insureio Technologies, we brought you the first CRM designed by and for life insurance agents.

"I've worked with David Cranfield since 1998. His team at Pinney goes the extra mile. Their efforts for our clients make it clear that relationships and service are the backbone of their practice."
-Brian Trouette, Trouette Insurance Agency

MEET INSUREIO

Unleash the power of automation to streamline insurance marketing and lead management.

Insureio is more than a client relationship management system — it's an evolutionary change in the way insurance is sold. It combines all the features of a traditional CRM, along with a life insurance quote path, drop-ticket processing through Pinney Insurance, email marketing functionality, built-in consumer-facing content, and agency management capabilities, all in one cloud-based package.

Insureio includes:

- Built-in insurance quoting with field underwriting & suitability tools
- Built-in drop-ticket application process
- Task & event tracking
- Create & store notes within a client profile
- Customizable & embeddable website quoter
- Ability for a consumer to generate their own real-time quote & submit an application request form
- SMTP e-mail integration & mass e-mail sending
- Pre-built nurture e-mail campaigns for leads & clients
- Incorporated text messaging
- Automated follow-ups based on lead status
- Detailed sales reports

Once you submit an application ticket or referral, our team of specialists takes over and completes the rest of the process on your behalf, allowing you to focus on selling.

> Insureio is so much quicker than Aliss that it's cut the time in half for us. We are loving Insureio!
> -Wendy A., Westlake Village, CA

2017 FINALIST FOR THE LIDMA INNOVATION AWARD

Insureio was named as one of six finalists for the first-ever Innovation Award awarded by LIDMA. The award recognizes positive disruption in the life insurance industry, with the goal of making the process easier for consumers.

MEET THE TEAM

R. JAN PINNEY CLU, CHFC, CPCU

Chairman & CEO

800-823-4852 x 8701

An author, speaker, consultant, and 42-year Life and Qualifying Member of MDRT, Jan is an active, hands-on brokerage agency principal.

He served as the 2004-05 President of the National Association of Insurance and Financial Advisors (NAIFA) for the state of California, is on the LIDMA Board of Directors, and is a member of AALU and MDRT's Top of the Table.

KATIE CUMALAT

Vice President, Sales

Katie utilizes her 18+ years of life insurance industry experience to build and develop sales teams that reach individual and collective performance potential. She leverages her background as a personal producing agent to generate additional revenue by identifying new and creative cross-selling opportunities.

PHONE: 800-823-4852 X 8720

CANDI BRUNDAGE

Manager, App Fulfillment Team

Candi manages our app fulfillment team to ensure our partner agents' cases get processed quickly. Her focus is on process improvements to speed up the eSignature and submission process, with a long-term goal of enabling agency growth through process improvements.

PHONE: 800-823-4852 X 8757

MARY ELLEN METEER

Manager, Business Fulfillment

Mary Ellen manages our new business team to ensure our partner agents' cases get placed quickly. From diligent follow-up to ePolicy delivery, she helps our entire team, from case managers to underwriters to policy delivery specialists, grow your business by providing your clients with impeccable customer service.

PHONE: 800-823-4852 X 8790

AWARDS & RECOGNITION

"While their technology is superior I believe Pinney has an even better asset. That asset is its people. The leadership, management, brokerage directors, underwriter, case managers, application team, delivery team and every other person I have ever interacted with at Pinney has gone above and beyond for our business." — Alex Labrinos

Jan Pinney
2021 LIDMA Vision Award Winner

Ryan Pinney
One of the inaugural winners of NAILBA's 2019 ID Twenty Award

Pinney Insurance
Winner of the 2018 iPipeline Industry Leadership Award

Insureio
2017 Finalist for the LIDMA Innovation Award

Ryan Pinney
One of LifeHealthPro Magazine's "24 Most Creative People in Insurance"

DAVE CRANFIELD
Brokerage Manager

Dave's out-of-the-box thinking helps producers find the perfect planning solutions for his clients. In his 25 years in the industry, he has served in multiple roles with NAIFA on a national level, as well as on the state boards of Colorado, Alabama, and Ohio.

PHONE: 800-823-4852 X 8791

SETH LEGATOWICZ
Brokerage Manager

Seth began as a Financial Advisor with Merrill Lynch before specializing in life insurance planning. He has managed retail and brokerage operations with an emphasis on a consultative approach and impaired risk underwriting.

PHONE: 800-823-4852 X 8807

JOSHUA HERRINGTON
Assoc. Brokerage Manager

Joshua is an Air Force veteran who strives to help producers be more effective and make more money. His uses his creativity and team-building skills to create opportunities and efficiencies for our agents.

PHONE: 800-823-4852 X 8765

DAVID JONES
Assoc. Brokerage Manager

David has over 10 years of experience in life insurance sales. His broad sales experience helps him tailor unique and effective solutions for agents looking to grow their businesses.

PHONE: 800-823-4852 X 8741

PINNEY
I N S U R A N C E

"Pinney has been an outstanding partner! Their support has been crucial to the success of our business. They have a rockstar staff that processes our backend so we can spend more time helping clients. Their CRM (Insureio) makes it easy to keep track of our business in real time. They've always been eager to help our business grow. Communication and responsiveness has been superb at all levels. We highly recommend Pinney!"

Jason Dana, JRC Insurance Group

Securities offered through
Transamerica Financial Advisors inc. A Registered Broker/Dealer, Member FINRA & SIPC.

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