

**Phase<sup>2</sup> is experienced in working with structure settlement brokers throughout the country. We realize there is a learning curve involved in the selling of index annuities and we will work with you, from start to finish, in assisting you in satisfying your client's needs.**



### **Case Consultation**

As wholesalers that have access to over 150 products from over 50 companies, we review your client's current situation and gather all the relevant facts.



### **Client Needs Analysis**

We match your client needs to the most suitable products available.



### **Solutions**

We discuss the spectrum of ideas with you and provide you with solutions and presentations for your client to consider.



### **Present to Client**

We will facilitate a telephone conference with you and your client if needed. As an optional service we are available meet with you and your client in person.



### **Paperwork**

We help you complete the application and have you properly appointed to the company involved in the transaction. In addition, we follow up on all outstanding requirements.



### **Get Paid**

You receive the full commission, and we are paid by the carrier as a wholesaler for our volume of business. In many instances, your commission is 7% or higher.