

Instructions for the Life & DI Cross-Sell Kit

If you have life insurance clients, you have the perfect market for cross-selling disability income insurance (DI) to your current book of business. One of Illinois Mutual's successful, long-time agents had great success selling DI to his life insurance clients.

Here's how he did it:

1. Send the pre-approach message as a letter or email.

This kit includes a DI cross-sell pre-approach message to send to your life insurance clients.

You have two options:

- » Mail the message as a letter using the fillable PDF.
- » Send the message using the plain text email.

2. Include DI quotes with each letter or email.

Use our DI illustration software to create a quote. This quote will be based on your client's personal information to show them how affordable DI can be. Attach a personalized DI quote to each letter or email.

Visit our DI illustration tutorial at www.illinoismutual.com/illustrations.

3. Follow up.

Wait a few business days, then follow up with your clients through phone or email.

4. Submit applications electronically.

After clients have expressed interest in applying for DI, use our eApps to submit business electronically. This will help ensure the apps arrive complete and in good order, and our underwriters will be able to provide a faster decision.

Visit our eApps tutorial at www.illinoismutual.com/eApps.

Contact our DI sales team if you have questions or need help with illustrations, applications or anything else.

(800) 437-7355, ext. 775 • Sales@IllinoisMutual.com

