



Driving Advisor Performance  
Annuities • Life • Retirement

# ASSET MARKETING SYSTEMS

LEADING FORWARD TOGETHER



INVESTMENTS

A large graphic with a blue background and a hexagonal grid pattern. It features several icons: a document with a pen, a bar chart with an upward arrow, a hand pointing at a magnifying glass over a bar chart, a person at a presentation board, and a shield with a padlock. The text 'GUARANTEED INCOME' and 'ASSET PROTECTION' is positioned below the grid, and 'ASSET MARKETING SOLUTIONS' is at the bottom.

GUARANTEED INCOME

ASSET PROTECTION

**ASSET MARKETING SOLUTIONS**

[WWW.ASSETISMARKETING.COM](http://WWW.ASSETISMARKETING.COM)



We are part of a family of companies responsible for **20% of Fixed Indexed Annuity production** in the U.S.

---

# ABOUT US

---

## **Who is Asset Marketing Systems?**

Asset Marketing Systems Insurance Services, LLC (AMS) is a distributor of insurance products with an expertise in Fixed Index Annuities, Fixed Annuities, Life and Long-Term Care Insurance. As an Independent Marketing Organization (IMO), insurance carriers utilize us to promote and distribute their products and services to advisors. Offering a comprehensive array of custom tailored marketing and lead generation plans, our goal is to build advisors' sales, profitability, and brand recognition as an expert in their marketplace. We've spent years developing the most effective client retention tools, and unique ideas for branding your business in the community, regardless of your budget.

Every advisor who works with us has the support of a personal Asset team comprised of a Business Consultant and a Marketing Consultant who are dedicated to working alongside you to expand your business through the sale of principal-protected insurance products. By providing product distribution, compliant training, marketing services, case development, and back office support for 300+ product options, we help take you from where you are to where you want to be.

## **What Sets Asset Marketing Systems Apart From the Crowd**

A leading Independent Marketing Organization (IMO) for annuities and life insurance since 1996, financial and insurance professionals across the country trust us at Asset to help them build successful practices and thrive in an ever-evolving industry and competitive landscape.

Asset is proud to have developed strong relationships with some of the largest carriers in the country, including American Equity, Allianz, EquiTrust, North American, Athene/Annexus and Nationwide. Over the course of 20+ years, we have produced more than \$10 billion of annuity production. We are also a member of a family of companies that make up 20% of fixed annuity production in the U.S. Currently, fixed indexed annuities comprise 80% of production, with the remaining 20% equally comprised of MYGA, SPIA, and fixed rate annuities.

## **A Team Behind You**

Beyond our ability to provide agents and advisors with many product options from a number of quality carriers, we deliver superior agent education thanks to our dynamic, talented, and knowledgeable life insurance team. Combined with our energetic team of annuity experts who help advisors stay up-to-date on the latest annuity strategies. Asset has set an industry standard for our commitment to excellence, ethics and integrity in business, and producer-client satisfaction.

**WE INVITE YOU TO BE PART OF THE ASSET EXPERIENCE.  
TAKE THE STEP TODAY FOR A MORE SUCCESSFUL TOMORROW.**

# INDUSTRY LEADING SERVICES & OFFERINGS

---



## **Annuity Product Specialists**

Find the right fit for you and your clients

- Annuity education
- Crediting strategies
- Lifetime income benefit riders
- Comprehensive product detail analysis
- Annuity concepts – basic through advanced
- Suitability education and review
- Product updates
- Product webinars
- Product positioning
- Laddering strategies
- Annuity sales coaching
- Niche product recommendations

## **Life Product Specialists**

Finding the solutions to your most difficult cases

- Comprehensive product detail analysis
- Product updates
- Product webinars
- Product positioning
- Niche product recommendations
- Multi-product solutions
- C.O.L.I. strategies
- Asset-based LTC
- Premium financing
- Tax reduction strategies
- Proprietary life product
- IUL planning software

## **Proven Marketing**

Field tested solutions to generate more leads

- Consumer Sales Seminars
  - The New Retirement Reality (NRR)
  - Retirement Income Puzzle (RIP)
  - Social Security Puzzle
  - Women's Path to Retirement
  - IUL Multi-Generational
  - Roth IRA
- Practice management solutions
- Public Relations
- Broadcast on-air exposure
- Full-service agency services
- Comprehensive marketing services via Asset Marketing Portal
- Financial Literacy programs
- Radio offerings
  - Asset broadcaster radio show package
  - RAFT radio leads
- Managed social media programs

## **Creative Services**

Creatively thinking about your business needs

- Logo and brand identity
- Custom brochures
- Event support

- On-location or on-site photography
- Video production
- Custom website design and development
- Branded materials
- And more!

## **Supplemental Software**

- Financial planning software
- CRM systems

## **Annuity and Life Case Management**

Consistently providing agent and client satisfaction

- Complete Back Office Support
- 80% Avg. Placement Rate. (20% higher than other FMOs!)
- Suitability review
- Quick and convenient E-applications
- Application scrubbing
- Proactive case management
- Impaired risk assessment
- White glove service on large cases
- New business and application training

## **Coaching and Training**

- FINRA reviewed sales systems
- Prospecting and lead generation
- Appointment setting and staff training
- Case development
- Marketing
- Sales
- Products
- Business development
- Asset Symposium
  - Industry's leading expertise
  - Comprehensive sales and marketing training
- Sales and Networking Forums
  - Hear from industry authors and speakers
  - Learn the latest sales and marketing strategies
  - Network with top producers nationwide

## **Elite Advisor Mentor Program**

Access Elite advisors for coaching and mentoring

- Sales coaching
- Seminars and presentation skills
- Business planning, profitability and expense management
- Referral strategies
- Partnering strategies (CPAs and attorneys)
- Practice building and office structure
- Staff training

## **Strategy and Planning**

Refine your marketing and sales strategy to grow your business

- In-depth market analysis and business plan development
- Identify critical success gaps
- Analyze market dynamics
- Establish a clear position for your offering and area
- Discover and articulate your unique sales position
- Measure and refine goals on an ongoing basis

# CARRIERS

## EXCLUSIVE DISTRIBUTION PARTNERS

These products are provided only to elite IMO's with highly effective marketing and sales models, allowing more product benefits for clients.

**ANNEXUS** - Athene - Nationwide - Minnesota Life

**DELAWARE LIFE**

**INNOVATION DESIGN GROUP (IDG)** - North American - Security Benefit

## COMPLETE PRODUCT LINE UP

COMPANY	ANNUITY	LIFE	LTC	DI
ANNEXUS - Athene - BCA <i>(Proprietary)</i>	✓			
ANNEXUS - Minnesota Life - BGA <i>(Proprietary)</i>		✓		
ANNEXUS - Nationwide - New Heights <i>(Proprietary)</i>	✓			
DELAWARE LIFE <i>(Proprietary)</i>	✓			
IDG - North American - PrimePath <i>(Proprietary)</i>	✓			
IDG - Security Benefit - TVA & SBA <i>(Proprietary)</i>	✓			
LEGACY - Ameritas <i>(Proprietary)</i>	✓			
LEGACY - Americo <i>(Proprietary)</i>	✓		✓	
Allianz	✓	✓		
American Equity	✓			
American General	✓	✓		
American General of NY	✓	✓		
American National	✓	✓		
Assurity Life	✓	✓	✓	✓
Athene Annuity IA <i>(American Investors)</i>	✓			
AXA		✓		
Banner		✓		
BrightHouse Financial		✓		✓
EquiTrust	✓	✓		
Fidelity & Guaranty	✓	✓		
Fidelity & Guaranty NY <i>(OMFN - NY)</i>	✓	✓		
Fidelity Life		✓		
Forethought Annuity	✓			

COMPANY	ANNUITY	LIFE	LTC	DI
Great American	✓			
Guarantee Trust Life		✓		
Guggenheim Life And Annuity Company	✓			
John Hancock USA		✓		
Kemper Senior Solutions		✓		
Lafayette Life		✓		
LifeSecure Insurance			✓	
Lincoln Financial	✓	✓	✓	
Madison National		✓		
Mass Mutual		✓		
Med America LTC			✓	
Minnesota Life/Securian		✓		
Mutual of Omaha <i>(United World)</i>	✓	✓		✓
Mutual Trust Life	✓	✓		
National Life Group	✓	✓		
National Western Life	✓	✓		
Nationwide		✓		
North American	✓	✓		
Oxford Life	✓	✓		
Penn Mutual Life		✓		
Phoenix Life	✓	✓		
Principal Financial Group	✓			✓
Protective Life	✓	✓		
Prudential Financial Life		✓		
Prudential Financial LTC			✓	
Sagacor Life	✓	✓		
Savings Bank Life Ins. of MA		✓		
Sentinel Security Life	✓			
State Life - OneAmerica	✓	✓	✓	
Symetra Life Insurance Company	✓	✓		
The Standard Insurance Company				✓
TransAmerica <i>(Trans-Family)</i>	✓	✓		
United of Omaha LTC			✓	
VOYA NY <i>(ING NY)</i>	✓			
VOYA Security Life of Denver		✓		

# YOUR TEAM

---

## MANAGEMENT TEAM



**JENNIFER METCALFE-SCHENDEL**  
*President & CEO*  
X2178



**CASEY COTTON**  
*Chief Technology Officer*  
X2190



**TRAVIS FRATINI**  
*Senior Director,  
Life & Annuity Sales*  
X2166



**SKOTT MCKINNEY**  
*Director,  
Marketing & Creative Services*  
X2168



**MARK ZWERENZ**  
*Head of Recruiting*  
X2188



**JOAN STEMLER**  
*Senior Director,  
Admin. & Events*  
X2165



**MIA DEMPSEY**  
*Manager,  
New Business Operations*  
X2171



**CLEM DARTEY**  
*Manager,  
Business Integration & Support*  
X2161



**SIMONETTE ANDRES**  
*Controller*  
X2183

## BUSINESS CONSULTANTS

Guiding Advisors with Sales and Marketing Systems, Appointment Setting, Staff Training, and Sales Process Review.

---



**SAM PAYNE**  
X2127



**DEE COSTA**  
X2121



**BRUCE BEATY**  
X2119



## MARKETING & CREATIVE

Providing consultative marketing and agency level creative services.

**(888) 303-8755**

---

**LEXIE GIUSTI**

*Marketing Consultant  
X2173*

**NATASHA GHANEM**

*Graphic Designer II*

**BRANDON COOPER**

*Front-End Developer*

**JESSICA WARFIELD**

*Marketing Consultant  
X2172*

**LES GARDNER**

*Digital Designer*

**GARRETT LYONS**

*Graphic Designer*

## SALES/CASE DESIGN/ILLUSTRATIONS

Niche product recommendations and positioning, comprehensive product detail analysis, and sales concepts.

**(866) 546-5267 | Option 1**

---

**TRUDY CRANE**

*Sr. Annuity  
Sales Consultant*

**JOSH VERHOEVE**

*Annuity & Life  
Sales Consultant*

**KURT METCALFE**

*Annuity Sales Consultant*

**RICHARD PASKAL**

*Life Sales Consultant*

## NEW BUSINESS PROCESSING

Impaired risk assessments, assistance with forms and applications, application scrubbing, and proactive case management.

**(866) 546-5267 | Option 2**

---

**LINDSAY THORNHILL**

*Annuity & Life  
Case Manager*

**KATIE HSIEH**

*Annuity & Life  
Case Manager*

**DANIELLE BLIND**

*Life & Annuity  
Case Processor*

## LICENSING

Contracting inquiries, assistance with requirements needed for appointments, and commissions schedules.

**(866) 546-5267 | Option 3**

---

**VIRGINIA MCCARDELL**

*Licensing Coordinator*

## EVENTS

**VALINDA WASHINGTON**

*Manager,  
Events & Design*

**BRETA LEMEN**

*Exec. Assistant/Events  
Coordinator Assistant*

**MADISEN WOODS**

*Administrative Assistant*

## FINANCE

**RIEKO HELVESTINE**

*Staff Accountant*

**STEPHANIE TOWNSEND**

*Junior Accountant*





Asset has **everything**  
you need to make  
the **goals** for your  
practice a **reality**.

---



Driving Advisor Performance  
Annuities • Life • Retirement

15050 Avenue of Science, Suite 100  
San Diego, CA 92128  
888-303-8755

[WWW.ASSETISMARKETING.COM](http://WWW.ASSETISMARKETING.COM)