

AN INTRODUCTION TO



The Christensen Agency

Disability Insurance Brokerage



**→ 55+ years of combined
Disability Insurance
Brokerage Experience**

Our Mission

The Christensen Agency strives to provide superior product, superior service, and superior sales support to insurance and investment professionals who seek a high-quality mutually beneficial relationship. We pride ourselves on helping you provide financial security for your clients in the event of a disability while saving you time and making you more money.

- 1. Assure our producers a competitive edge in the marketplace through products, case design, underwriting options, and DI industry expertise.**
- 2. Assist our producers in the expansion of their DI markets and growth of their DI business.**



The Christensen Agency

Disability Insurance Brokerage



Individual Disability Insurance

Business Overhead Expense

Key Person DI

Disability Buy Out

FOCUS 10 Term Life

High Risk Disability Insurance

Loan Repayment Protection

Retirement Security DI

Simplified Lump Sum

Guaranteed Issue DI and BOE

Complete Back Office Support

- ✓ **Advanced Case Design and Support**
 - **Cases designed with your client's needs in mind (cost, contract, riders, etc...)**
- ✓ **Single Source – Multiple Carrier Underwriting**
 - **File Building Capabilities**
 - **Specific Condition Questionnaires**
 - **Informal Inquiry Program**
- ✓ **Licensing and Contracting**
- ✓ **Numerous Illustration Capabilities**
- ✓ **Relationship Driven – Servant's Mentality**

Relationship Driven – Servant's Mentality

Your Team

Mark Christensen

- Sales Support and Training
- Product Specialist
- Case Design
- mark@thechristensenagency.com

Jenny Christensen

- FIO Notifications
- Benefit Update Notifications
- jenny@thechristensenagency.com

Sherry Bowling

- Pending Business Coordinator
- In Force Policyholder Service
- sherry@thechristensenagency.com



www.thechristensenagency.com



- ✓ Online Quote Requests
- ✓ Applications
- ✓ Licensing Forms
- ✓ Contact Information

Roles and Relationship Examples



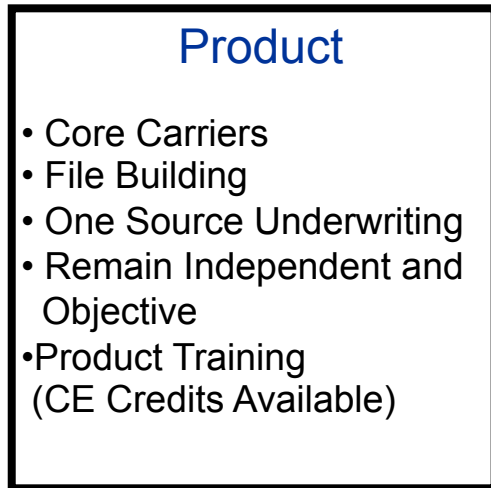
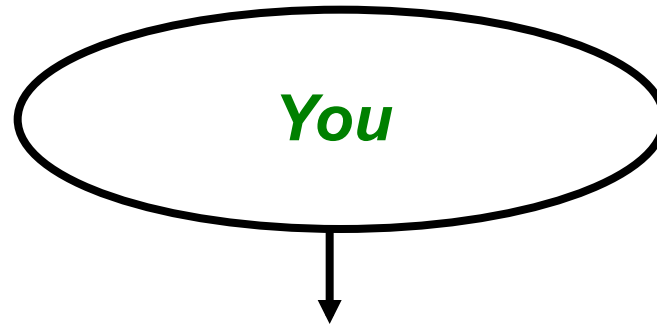
1) Serve as Primary Source for DI Product and Support

- select 1 to 2 core carriers (example Ameritas and Principal)
- access to all supporting carriers as needed due to underwriting or product considerations
- maximize compensation through expense level production and qualifying bonuses
- networking opportunities with other Christensen Agency producers
- partnering for mutual success model while maintaining complete independence

2) Serve as Secondary Source for DI Product and Support

- access as needed for specific cases outside of your primary relationship
- specialty products and programs not readily available to you
- traditional brokerage agency model primarily transaction driven

SUMMARY





The Christensen Agency

Disability Insurance Brokerage

Mailing Address

Post Office Box 471208
Charlotte, North Carolina 28247

Physical Address

7401 Carmel Executive Park, Suite 205
Charlotte, North Carolina 28226

Phone Numbers

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