



3/17/20

Update from BSMG

Protecting the Future of Families and Businesses... that's what we collectively do in the Life, Annuity and LTC business. It's inscribed on our walls here at BSMG – and the entire BSMG Family strives to live that mission every day. If there was ever a time for our industry to stand tall and communicate proactively, this is it.

Yet the hits keep on coming. The daily barrage of updates and new restrictions is tough to handle – we all are facing a new reality – for a while. Now more than ever, our obligation to advise clients on risk management solutions is needed – and we are here to help.

We will get through this together and in the course of performing the noble work of our profession, we'll help a lot of families stay financially strong.

What We Do Matters... We are here for you... Let's Do Our Part.

The extraordinary events of the past few weeks have changed and will continue to change all of our lives in big ways – for now. We have the technology, expertise and creativity to help you, your team and your clients.

Life Insurance, Annuities, and LTC Solutions are needed more than ever. American families and business are counting on us (the collective us) to provide them insight, counsel and yes, risk management options. These solutions provide guaranteed protection, liquidity and income.

Preparedness

BSMG is ready to work 100% from home. We will begin phasing in work-from-home over the next several days. All non-essential business travel has been suspended.

About half of our team is already working from home and you will see no difference in our ability to operate as this transition happens. Same phone numbers, extensions, email address, and mobile numbers.

Contact List: [Click here for all our individual contact information.](#)

We are using Zoom through our communications platform, Ring Central, to conduct virtual meetings. If you have a meeting with us scheduled, our sales team will be in touch to schedule a virtual meeting.

Products



The cost of some products will rise as they are interest rate sensitive... this has already happened in the Annuity and Linked Benefit arena. Rather than being surprised by this, lean into it. Protection may cost a little bit more now, but it is readily available.

Life Insurance: Carriers are open for business and looking to make offers – look back upon clients that “didn’t make a decision” – and call them.

VIVE: If there was ever a time to “lean into” easy, fast & paper free term insurance, now is it.

Annuities: Principal protection and guaranteed income at a time when clients need to “de-risk”.

Linked Benefits: Create a tax-free pool of \$ for LTC benefit... that shore up and protect a client’s portfolio.

Communication

BSMG will provide regular communication (emails to you and your staff) for product, carrier updates and any business changes.

Electronic Processing

New Business, Contracting, Policy Service: process changes and the routing of paper and forms, etc. If you need a paper-free process for ANYTHING, just contact us.

Some Parting Thoughts

- Stay pro-active, talk to your clients – reach out to them – see how you can help. We will be doing the same with you.
- Qualitative vs. Quantitative. Think about this. Protection and peace of mind...it’s valuable and it’s a qualitative discussion with your clients.
- BSMG stands ready to help you and your clients; remember we are here for: policy service, cases in process, revisiting old cases, new requests, questions of any kind or a friendly conversation!

Please let us know how we can help. BSMG will stay in touch regularly. We are in this together and remember, this too shall pass.

Best,
Jason

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