Core Income Advisors

The FMO that makes your job (a lot) easier

Because every great financial advisor deserves a trusted sidekick that **actually** delivers.

There are a thousand FMOs out there, but **nobody's been able to do it like you guys do.**

- Jeff K., Financial Advisor

CORE

An FMO, IMO, and independent insurance brokerage with **actuarial expertise**.

We Help Advisors Deliver Financial Certainty

MINIMIZE RETIREMENT RISK, MAXIMIZE CLIENT CONFIDENCE

Equip clients with clear, data-driven strategies backed by actuarial insights to meet their long-term goals and effectively manage risk, **further positioning you as their trusted expert**.

THERE WHEN YOU NEED US MOST, EVERY TIME

Rely on our 100% Answer Rate Guarantee for instant access to the support you need to **build client trust and strengthen your reputation**.

YOUR NEEDS FRONT & CENTER, ALWAYS

Focus on client relationships while we help with marketing, back-office support, and more— empowering you to **scale efficiently and achieve your goals**.

800-541-7713 info@coreincome.com CoreIncome.com

CORE

Say goodbye to back-office headaches. Let us handle the heavy lifting so you can **focus on your clients!**

01. SAME-DAY SIGNATURE GUARANTEES

Fast and reliable signature guarantees with a same-day turnaround.

02. PROACTIVE CASE MANAGEMENT

We follow up with carriers on transfers to keep your cases moving.

Ongoing communication with insurance companies, delivering updates within 1-5 business days (depending on the situation).

03. BUSINESS SUBMISSION & PROCESSING SUPPORT

Access to iPipeline & FireLight to help you and your staff submit business accurately the first time.

100% application review—we'll flag and communicate any issues the same day we receive an application.

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04. CORE CONNECT: YOUR DIGITAL ADVANTAGE

Biz Tracker: Stay updated on pending policies and transfers.

Underwriting Tools: Get insights to streamline approvals.

We take it to "Done!"

05. UNDERWRITING ADVOCACY & CASE SHOPPING

We review all underwriting offers to ensure they are fair.

We'll appeal offers and shop your case across multiple carriers for the best possible outcome.

For large cases, we can informally shop medical files with carriers before formal submission.

06. FORMS & DOCUMENTATION ASSISTANCE

We'll pull all necessary forms for applications, beneficiary changes, withdrawals, and more.

DocuSign setup & processing for seamless electronic signatures.

UPS labels provided for sending checks and original documents.

Transfer requirement guidance for multiple carriers.

Advisor Marketing That Makes Sense

CORE

You know your business— we know how to market it.

Don't know where to start with marketing?

From lead generation to referral strategies and everything in between, we've got your back.

New Client Trust

Laying the Foundation for Confidence

- Strong Website & Distinct Brand
- Educational, Client-Friendly Collateral

Client Acquisition

Turning Interest into Action

- Referral Strategy Playbooks
- Seminar Promotion & Support
- Drip Campaigns to Nurture Leads

Client Loyalty

Lifelong Clients; Next Generation Ready.

- Custom Branded Gifting
- Engaging Events & Execution Support

Your in-house marketing team without the fee

STRATEGY, STORYTELLING & SUPPORTER

ELEVATED EXPERIENCES & ENTHUSIASM

CONTENT, COPY & CATCHY LAUGHS

BRANDING, BALANCE & BOLD AESTHETICS

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Actuary Lab

A (free!) suite of risk management tools designed to help financial advisors **navigate client portfolios with precision**.

Mitigate Risk with Mathematical Precision

With Actuary Lab, you can simplify complex technical concepts and transform them into clear, custom reports for your clients. These tools are built to strengthen your practice and deliver more precise retirement plans with actuarial accuracy.

Longevity

Longevity≠ Life Expectancy. This tool helps you facilitate conversations with clients about what it means to plan for living longer than expected.

Inflation

With this tool, you can illustrate how inflation affects your clients' income and purchasing power throughout their retirement.

Sequence of Returns

A down year early in your clients' retirement could cut their savings by up to 10 years. Use this tool to show how market changes can impact their retirement.

Internal Rate of Return

The IRR tool strips away the marketing noise from insurance products and provides a clear, unbiased comparison.

Request your free access to **Actuary Lab**

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