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**.

CORE

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

- Jeff K., Financial Advisor

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**.

🔀 info@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.

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

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



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 <u>Collateral</u>

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

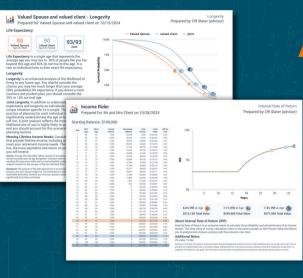
Your in-house marketing team without the fee



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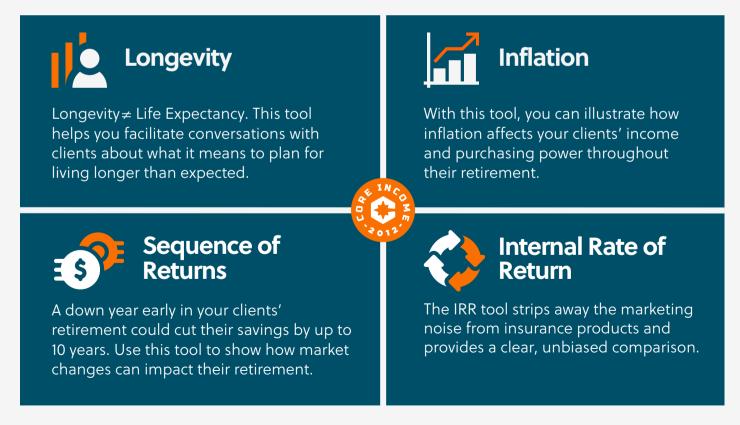


Actuary Lab

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.



Request your free access to Actuary Lab

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