Jordan & Jordan Associates

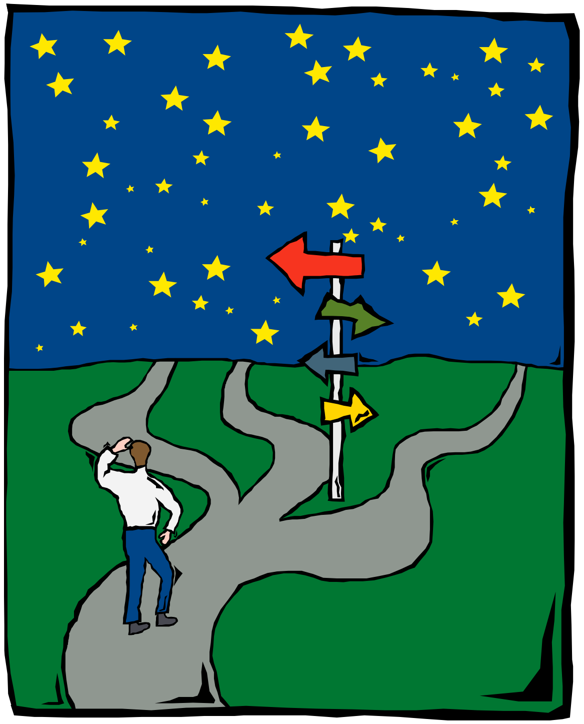
Financial Services Consulting

What is the best way to integrate insurance into the financial institution's core products and services?
Our program isn't meeting goal! Why? What next?
Will our sales force and support personnel ever work together?
Why aren't our platform people selling? Do we need them?

Can our existing sales force sell insurance?
How do we manage an insurance field force?
How can we make the agency we purchased profitable?
What else can we do to increase our success?

Want some real answers? Jordan & Jordan Associates has been helping organizations like yours answer these questions since 1990. We are a financial services management consulting firm focusing on the design, development, implementation, and delivery of full service insurance and investment programs for the financial institution marketplace.

Our size allows us to focus specifically on your needs from project inception directly through implementation to project completion. We offer no-nonsense, hands-on, tactical guidance every step of the way. We not only supply the roadmap, but we also make the journey right along with you to ensure your success.



"When your destination's vague,
any road will do"

With J&J your destination will be crystal clear – we offer you our experience, our knowledge, and our ingenuity either to create a new program or to enhance your current effort. We navigate you through the entire Jordan & Jordan Methodology ensuring all the projects are completed in the proper order, at the proper time, and with the proper expertise. J&J serves as the nexus of your entire venture providing the key that synthesizes all the various elements to form a successful insurance program.

Jordan & Jordan Methodology

Utilizing our four-step methodology, you will

1. Define exactly what you want – your vision for the program, your end result.

2. Assess accurately where you are right now in relation to that end result.

3. Determine precisely what you need to put into place to move you from where you are now to where you want to be.

4. Work with you through all the items identified in Step 3 until you arrive at your fully operational program.

Once you complete our process, you will be able to easily evaluate any products or services you may wish to add in terms of whether or not they will support your end result. By spending this time up front, you will guarantee your program will encounter few detours along the way as you steadily move toward your final destination.

Once we ensure your newly built or existing program is sound, we then begin to add the components needed for an integrated effort. The four key areas are sales, marketing, administration, and operations.

Sales

In order to provide your financial institution customer expert guidance in making financial decisions, the sales rep must be trained upfront, coached periodically, and managed on a continual basis. Providing these reps with sales tools and case management systems guarantees your financial institution customer will receive top quality service.

Marketing

The scope of your program defines the range of your marketing. Your strategy should blend both rep and non-rep programs aimed either at a specific target customer or at a division of the financial institution. Having the right products, the right carriers, and the right marketing processes provides the financial institution with a consistent program upon which to build.

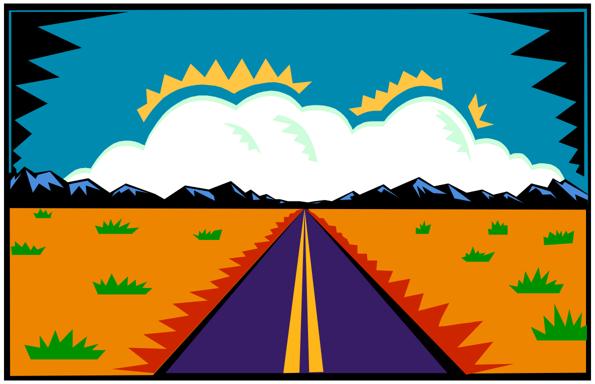
Administration

Without a well-structured and fully supported administration area, your program is doomed. From tracking a lead, to taking an application, to receiving a policy and commissions, a combination of manual and computer systems must be in place to achieve a successful sales effort.

Operations

To keep track of all the various elements of the sales process (pre-sale, sale, post-sale), the financial institution must have a monitoring system to compliment its program. For example, the Internet can provide both your customer and your sales reps access to multiple products and services. Customers can check on their current insurance policies, inquire about new policies, fill out financial plans, or communicate with sales reps. Sales reps can log-on to inquire about their customers' applications, to tie into marketing and sales information, and to verify their commissions.

Conclusion



"When your destination is clear,
the right road is obvious"

With J&J's Methodology your final destination is always in view. At any given moment you can immediately tell where you are in relation to your final goal allowing you to make all the small course corrections along the way to ensure you are traveling the most direct route.

You will arrive at your final destination with a minimum of time and expense having avoided all the wrong turns along the way. However, your success requires extensive expertise. Look to Jordan & Jordan Associates to know which products, which carriers, which marketing approaches, which systems, and which administrative strategies can best assist you in reaching your final destination.

We at J&J are ready to help you craft a program that fully integrates insurance/investments into your financial institution's core products and services.

Overview of Services

This overview illustrates the extent of J&J's available services. The particular services best suited to your situation can only be determined after completing Step 3 of our Methodology.

Sales

- Sales Culture Transition
- Management/Rep Recruiting
- Non-Rep Sale
- Coaching
- Risk Management Services
- Financial Planning

Regulatory

- Licensing
- Continuing Education
- State/Federal Regulations
- Compliance Systems
- Trust Insurance Services
- Due Diligence

Marketing

- Segmentation Strategies
- Direct Response
- Call Centers
- Internet
- Actuarial/Product Development
- Product Suitability

Systems

- Manual/Computer
- Data Mining
- Purchase/Outsource
- Evaluation

Administration

- Practice Improvement
- Audit Capabilities
- Administrative Structure
- Support Services
- Risk Management

Agency Structure

- Buy/Rent/Build
- Evaluation/Acquisition
- Agreements
- Licensing
- Internalization
- Transition

Clients We Have Served

Chase
First Merit Corporation
Union National Bank – Maryland
First National Bank – Missouri
Banco Popular
Community National Bank-Massachusetts
Citizens Bank
InsurMark
Independent Financial Marketing Group
PFG
Jackson National
SBLI of Massachusetts
Financial Profiles
Peoples First
Debt Cancellation Corporation

KeyCorp
Marine Midland
First National Bank-Virginia
Summit Bank
Charter One
GNA
Jefferson Pilot
Murphy Brokerage
Laughlin Group of Companies
The Hartford
Sun Life of Canada
Banc Insurance Services
Multidata
Digital Federal Credit Union
Financial Guidance Solutions

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