

Modern Life

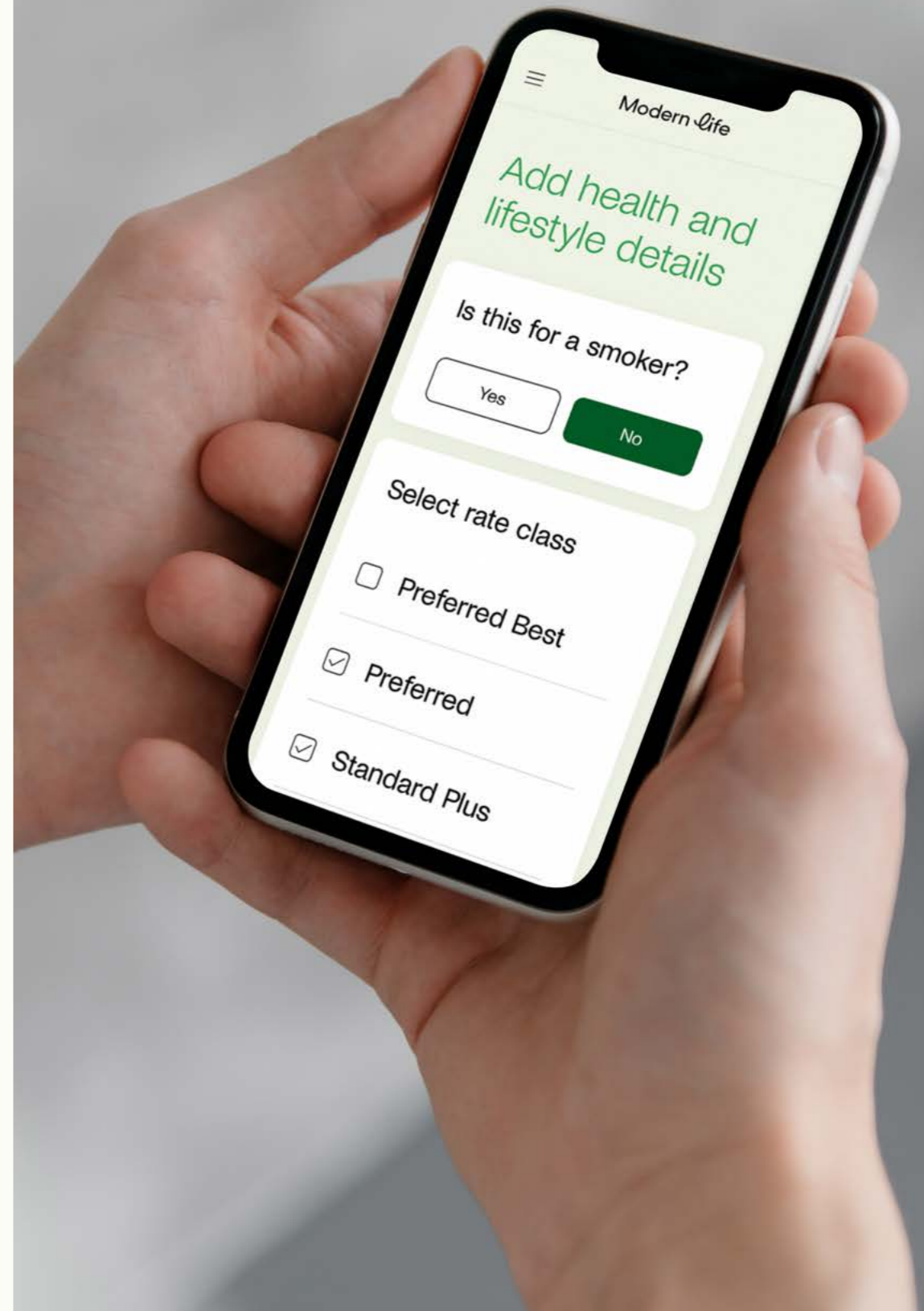
# *Empowering* the modern advisory firm

Modern Life is the preeminent, tech-enabled life insurance brokerage for the country's top financial professionals.



# A brokerage with innovation & expertise in *equal measure*

With sophisticated, end-to-end technology to streamline every step of the life insurance journey, dedicated brokerage experts who provide concierge service, and access to the country's top carriers, Modern Life supercharges your firm and empowers your team to serve the most complex client needs.



# Intuitive tech makes life insurance *simple*

*Integrated. Fast. Transparent.*

Our thoughtfully designed, proprietary brokerage platform helps you quote, apply, and manage your book of business.

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Online permanent and term life quoting

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Seamless, universal application process

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Full case details and requirement tracking

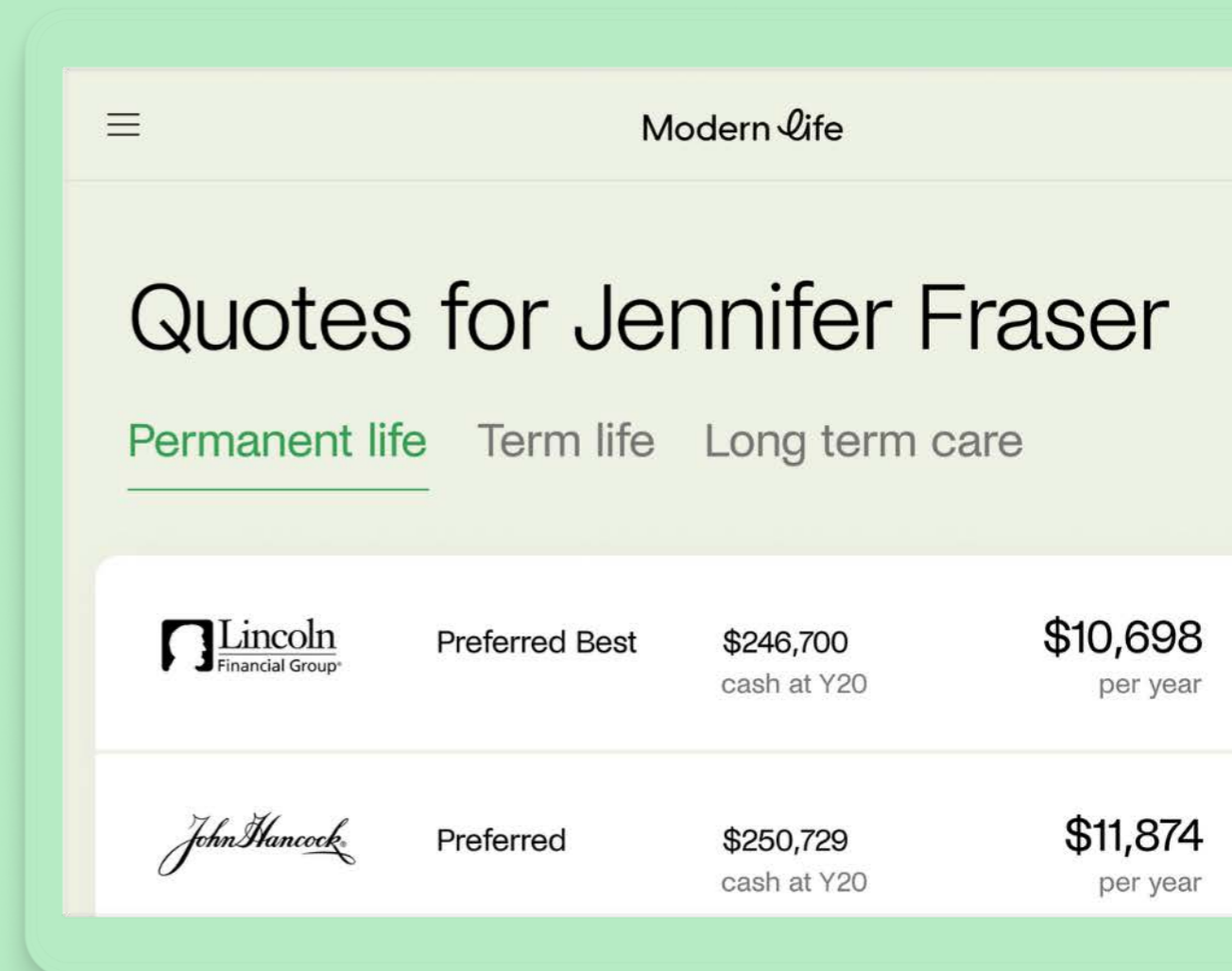
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Integrated client experiences

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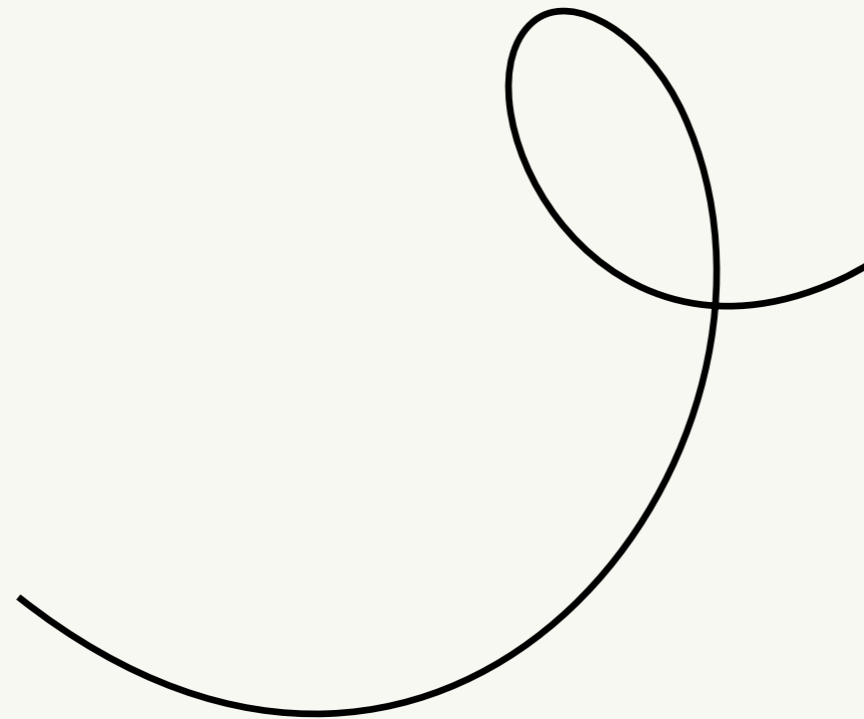
Data-driven, in-depth underwriting

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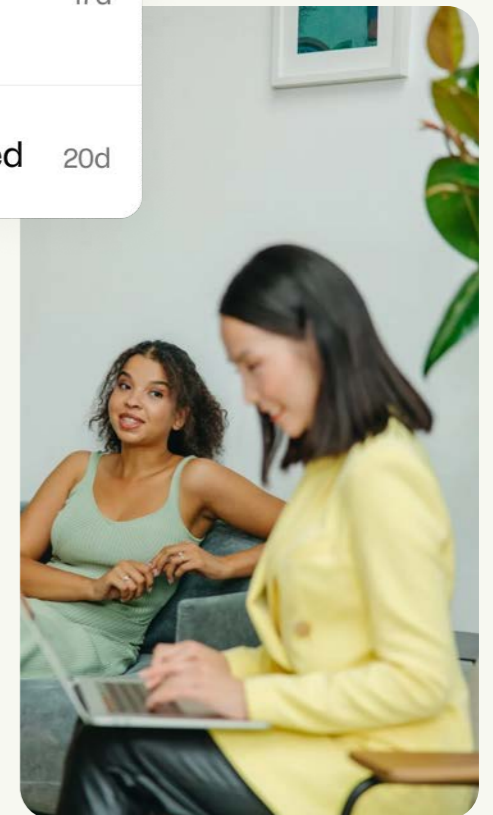
# Serve your clients *better, faster*

Picture all of your clients' case details in one place, with full visibility into requirements, underwriting offers, application statuses and documents, helping your entire team move together. Faster than ever.



Latest activity ×

-  **Lincoln WealthPreserve formal app approved** 1m
-  4 requirements completed 3d
-  Quotes added 10d
-  **Note added** 14d  
Current coverage includes \$1.75m VUL, net cash value is \$500k.
-  Status updated to Brokerage Review 17d
-  Client intake submitted 20d



# Integrated solutions *designed for advisors*

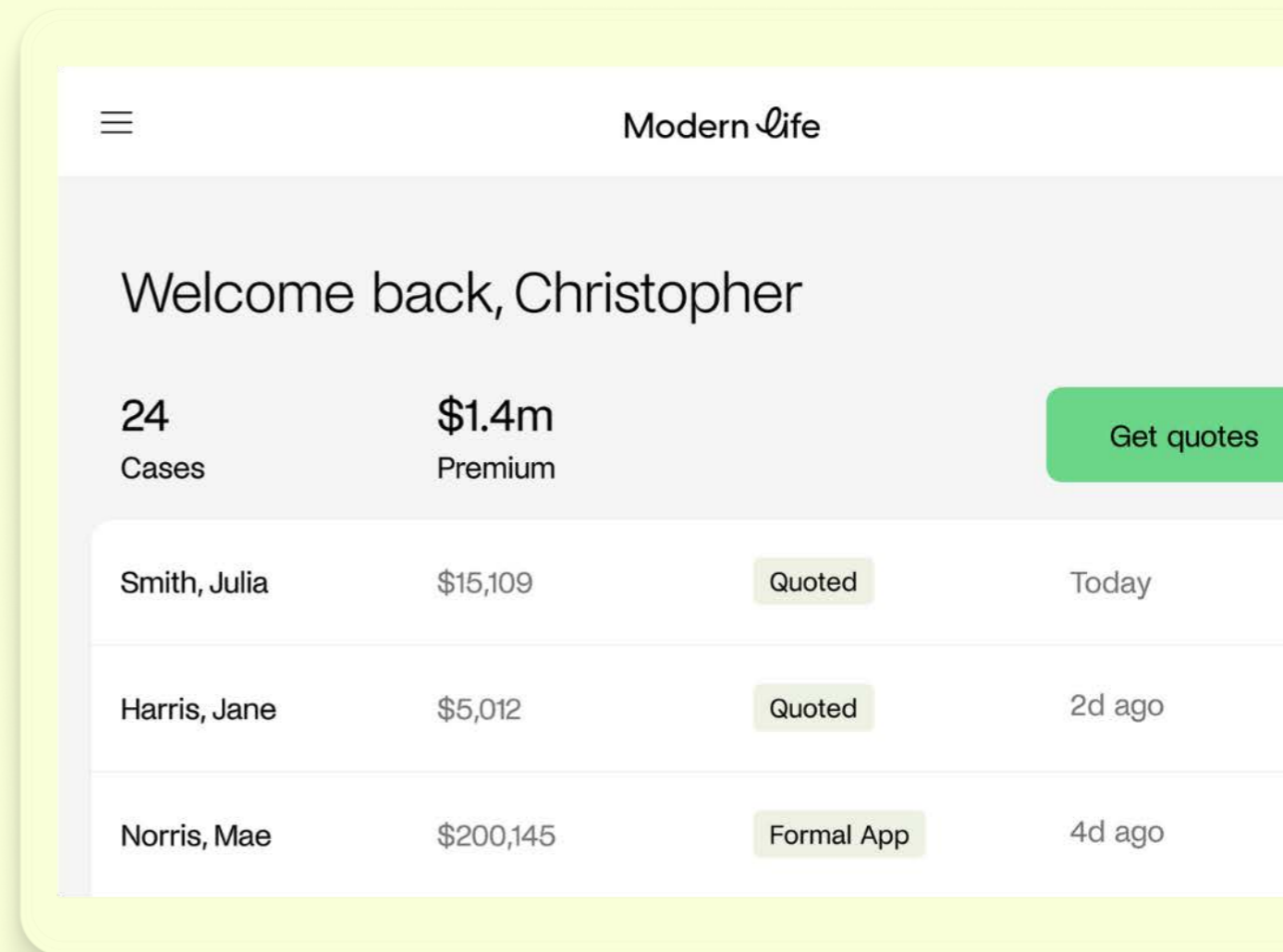
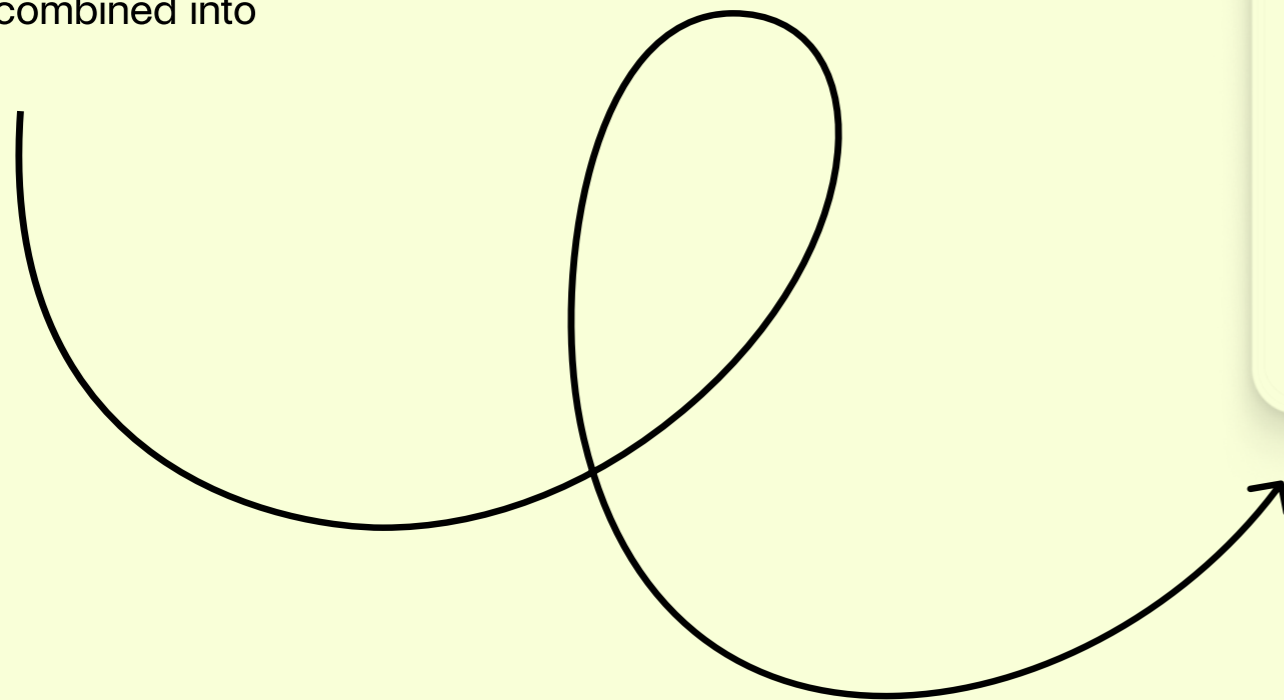
That means more speed and fewer headaches for your clients. And more efficient, streamlined days for your firm.

# 10

legacy tools and offline workflows combined into

# 1

integrated platform



# Expert support for the *most complex cases*

Our team of advanced planning experts, underwriters, case designers, and case managers provide concierge support for every client need.



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Jumbo cases

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Business planning and succession

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Wealth transfer

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Foreign nationals

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Data-driven, in-depth underwriting

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Premium finance

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# Tailored solutions to meet *every client need*

We offer a full range of financial protection products to serve your clients' goals.

- Permanent life

Indexed Universal Life

Variable Universal life

Whole Life

Universal Life

Survivorship

- Term life

- Long term care

- Disability

- Annuities

*More than 30 of the nation's top carriers*

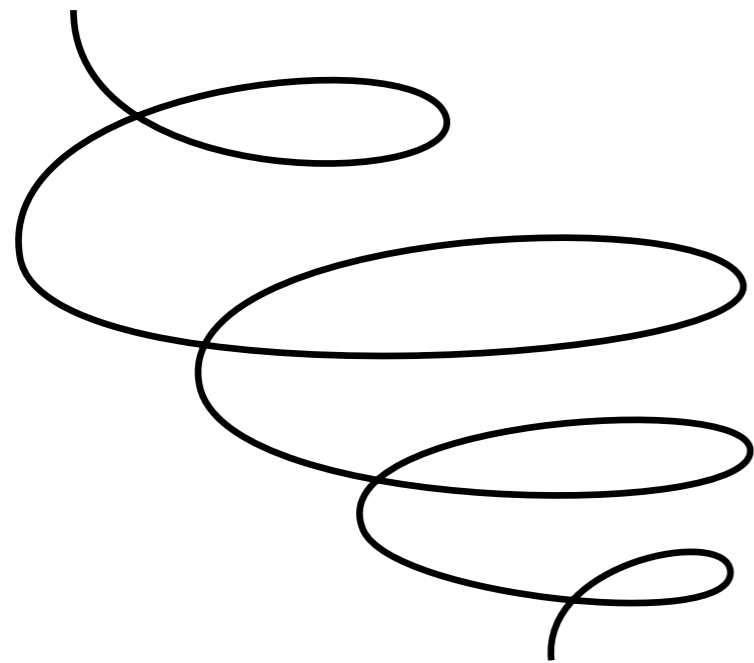


Securities offered through The Leaders Group, Inc. Member FINRA/SIPC 26 W. Dry Creek Circle, Suite 800, Littleton, CO 80120, 303-797-9080. Modern Life is not affiliated with The Leaders Group, Inc.

# Why work with *Modern Life*

# +82

net promoter score



# 1st

percentile of insurance  
industry customer satisfaction



*“Modern Life is a phenomenal company to do business with. They represent all the top carriers and they know all the sweet spots in order to compete on tough cases. They also have all the best technology and superb case managers to guide cases smoothly, from start to finish.”*



# *Modern Life* in action

- 46 year-old male previously denied coverage due to stroke history and A-fib
- Advisor seeks \$7M permanent insurance policy with an \$80,000 budget
- Modern Life brokerage team requests medical records and information
- ✓ Our underwriters and MD determine that the recordings show that no A-fib was present
- ✓ Brokerage team advocates with carriers' senior underwriters with new information and client receives 3 new offers
- ✓ *Policy submitted and issued within 7 days*

*“My client was thrilled with the offers. Not only did he get the adequate coverage he needed for his family’s financial security, but he also stayed within his budget. Modern Life made the whole process seamless.”*



Modern Life



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