



The Perfect Companion

The VRL is an enterprise-based support tool for insurers, B-D, firms or agencies with 25+ agents. It is the only financial library that is powered with “fillable” Adobe. This unique approach allows ALL of your producers to provide their clients with personalized and compliant content on virtually all insurance and financial concepts.

In addition to practice a changing concept videos on ***Cross Selling/eMarketing***, there are “how to” videos on all 15 different sections outlined below.

Priority Planning Concepts - A simple and effective pre-approach to quickly engage clients/prospects and make appointments...includes all tools and tracts.

Fact Finders - Forms for gathering facts about your clients for a variety of personal, business and estate needs.

Financial Snapshots - Financial Snapshots are unique, simple and modular total need analysis calculators.

Financial Workbooks - These worksheets and workbooks can be used with clients to help keep their "financial house" in order.

Client Presentations - Complete e-mailable presentations for virtually all personal, business and estate needs.

Concept Pages - Hundreds of e-mailable personal, business and estate planning one-pagers.

Life Guides - Checklists information and guidance on life events with financial implications.

Tax Information - Answers to tax questions on life and health insurance and annuities linking to the Tax Code.

FINRA Resources - The FINRA website is a resource for retail investors. It can provide your clients with good, credible, and unbiased third-party information.

Specimen Documents - Specimen documents to help attorneys prepare insurance-related documents.

Referred Lead Generator - The RLG is a prospecting engine that provides names of a client's neighbors. Used to obtain referred leads.

Target Market Lead Generator - The TMLG is a prospecting engine targeting all the doctors, lawyers, etc. in a small city or zip code.

Mental Vitamins - Articles and quotes by Jim Rohn, Zig Ziglar, Brian Tracy, Tom Hopkins and many others.

Building Your Practice - This book identifies the 6 systems a producer needs to succeed and tells how to establish them.

Financial Calculators - A wide array calculators covering insurance, retirement, investing, personal finance, loan amortization, business and other financial issues.

So why is the VRL “**The Perfect Companion?**” Because regardless of what you currently have for adviser support, the VRL complements them all... even FSEdNet!