



ABOUT US

SEEING ALL SIDES OF YOUR BUSINESS

3D Advisors, Inc. is an innovative brokerage general agency that works collaboratively with advisors to grow their insurance business.

We leverage comprehensive insurance solutions and knowledge derived from years of industry experience to help design creative plans to satisfy the needs of any client.

FOCUSED ON SUPPORTING ADVISORS

We strive for our business to be an environment for idea exchange and professional and personal growth. Advisors turn to us for education programs, strategic planning, pre-sale marketing and more. Our emphasis: what is most current in the industry and relevant to advisors' needs.

WHY 3D ADVISORS?

Our integrity, creativity and discipline set us apart. Expect nothing short of open dialogue and a heartfelt desire to achieve results for you.

JOIN OUR ADVISOR NETWORK

"The team at 3D makes prospecting and processing insurance cases extremely easy and efficient....This relationship is extremely valuable to our firm's current and future growth. A great partner!"

– Michael J. Lay, CPP®

OUR SOLUTIONS

Including impaired risk cases

LIFE (FIXED & VARIABLE)
ANNUITY
LONG-TERM CARE
DISABILITY

From a portfolio of 30+ carriers



800.785.6913 | www.3dadvisorsinc.com



MENU OF SERVICES

INTEGRATED INSURANCE SOLUTIONS FOR YOUR CLIENTS

Policy Evaluation Program (PEP)

- Turnkey program; no cost to you or the client
- Full policy analysis and recommendations

Business Valuation Tools

- Professional business valuation; no cost to you or the client
- Creates multiple business sales

Buy Sell Review

- Professional review; no cost to you or the client

Client Facing Generic Presentations

- Personal finance
- Health and medical
- Income taxes
- Home ownership
- Investments, retirement and estate planning
- Education funding
- Protecting your finances
- Social security and other government programs
- Business and charitable planning
- Client interaction forms and worksheets

Monthly Webinars

- Industry topics with sales ideas and concepts
- Usually 30 minutes or less

Local Training and Support Anytime

- Available for your team weekly, monthly, quarterly
- In-office training on new topics
- Collaborate on cases

Live Training and Educational Meetings

- Sales bootcamps
- Lunch and learns

Informal Underwriting

- In-house underwriter for large cases (\$50k+)
- Trial application with HIPAA consent
- Informal submission process
- Quick quote process
- Health questionnaires for various impairments and avocations

Formal Underwriting Process

- Order all exams and APSs
- Submit to carriers and track cases
- Dedicated new business teams at carrier level for 3D Advisors/Tellus

One Time Online Contracting

- Complete online contracting profile only once
- Allows 3D Advisors to contract all carriers as needed without more paperwork

Pre-Sale Support

- Internal marketing support for case design and illustration
- Quick turnaround time on illustrations and forms
- Full suite of product illustration and comparison tools for Life, LTC and Annuity

Compensation

- Highly competitive commission payouts

Seeing all Sides of Your Business. 3D Advisors Inc. is an innovative brokerage general agency that works collaboratively with advisors to grow their Life, Annuity, Long-Term Care and Disability business. We leverage comprehensive insurance solutions—from a portfolio of 30+ carriers—and knowledge derived from years of industry experience, to help design creative plans to satisfy the needs of any client. Our integrity and unparalleled advisor support set us apart. Turn to us for education programs, strategic planning, pre-sale marketing and more. Expect nothing short of open dialogue and a heartfelt desire to achieve results for you.

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CARRIER LIST

AIG

American General Life (Life/Annuity)
United States Life Insurance Co. of NY (Life/Annuity) *
Western National Life (Annuity)

Allianz

Allianz Life Insurance Company of NA (Life/Annuity)
Allianz Life of NY (Annuity) *

American Equity

(Annuity)

American National

American National (Life/Annuity)
American National of NY (Annuity) *

Americo Life

(Life)

Ameritas Life *

(Life/Annuity/DI)

Assurity Life

(Life/Annuity/DI)

Athene

(Annuity)

AXA *

(Life)

Brighthouse Financial

Brighthouse Life Insurance Co. (Life)
Brighthouse Life Insurance Co. of NY (Life) *

Columbian Financial Group

Columbian Life Insurance Company (Life)
Columbian Mutual Life Insurance Company (Life)

Delaware Life

(Annuity)

Equitrust

(Life/Annuity)

Fidelity Security Life

(DI)

Foresters Financial

(Life)

Gerber Life *

(Life)

Global Atlantic

Accordia (Life)
Forethought (Life/Annuity)

Great American

(Annuity)

Guardian Life Insurance Company *

(Life/DI)

Guggenheim

(Annuity)

John Hancock

John Hancock USA (Life)
John Hancock of NY (Life) *

Legal & General America

Banner Life Insurance Company (Life)
William Penn of NY (Life) *

Lincoln Financial Group

Lincoln Financial (Life/Annuity/LTC)
Lincoln Life & Annuity of NY (Life/Annuity/LTC) *

Lloyd's of London *

(DI)

Mutual of Omaha

United of Omaha (Life/Annuity/LTC)
Companion Life (Life/Annuity) *
Mutual of Omaha (DI) *

National Guardian Life

(LTC)

National Life Group

Life Insurance Co. of the Southwest (Life) *
National Life Insurance Co. (Life)

Nationwide *

(Life/Annuity)

New York Life *

(Life/Annuity)

North American Company for Life & Health

(Life/Annuity)

OneAmerica

(LTC)

Pacific Life

(Annuity)

Principal Financial Group

Principal National (Life/Annuity/DI)
Principal Life (Life/Annuity/DI) *

Protective

Protective Life (Life/Annuity)
Protective Life & Annuity (Life/Annuity) *

Prudential Financial *

(Life)

Securian

Minnesota Life (Life/Annuity)
Securian Life (Life/Annuity) *

Security Mutual Life Insurance Company of NY *

(Life/Annuity)

Symetra

(Life/Annuity)

The Standard

(Annuity)

Transamerica

Transamerica Life Insurance Company (Life/LTC)
Transamerica Financial (Life/LTC) *

Western & Southern

Western & Southern Life (Life)
Integrity Life Insurance Company (Annuity)
National Integrity Life (Annuity) *

* Approved in New York state

Carriers shown may not be available in all states. Subject to change without notice.

Updated 3/19/17