



Our Digital Doors are Open

Pinnacle Financial Services has the digital tools and resources you need to help protect your clients' wherever you and your clients happen to be.

If you're looking at going digital, you're in luck. It may be possible to do 100% of your business with us— pre-sale, to point-of-sale, to post-sale— from the comfort of your home with your clients in the comfort of theirs.

Pre-Sale →

Lay the groundwork.



Do your research.



Use digital resources to start new conversations.



Illustrate possible solutions.

Point-of-Sale →

Show how your proposed solution addresses their needs.



Make your pitch without leaving your place.



Use Pinnacle's online tools to expedite your business.



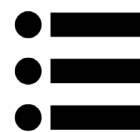
Check updated quotes.

Post-Sale →

Complete remaining "paperwork" and monitor the case to completion online.



Keep an eye on the process.



Services can be simple too.



Get paid.



Pre-Sale Lay the Groundwork

Do your Research

- Explore our variety of online resources (product details, current rates, state availability, marketing materials, etc.)
- Contact our Marketing team to discuss your practice, potential cases, and how working with Pinnacle can help your clients weather this continued economic uncertainty.
 - Contact Health Sales
1 (800) 772-6881 x7731
healthsales@pfsinsurance.com
 - Contact Health Support
1 (800) 772-6881 x7729
healthsupport@pfsinsurance.com
 - Contact Life Sales
1 (800) 772-6881 x6003
lifesales@pfsinsurance.com
 - Contact Life Support
1 (800) 772-6881 x3302
lifesupport@pfsinsurance.com

Prospecting is Possible Online

- **Consider moving prospecting activities online.** Platforms such as GoToWebinar and Zoom can be great ways to engage with large groups of prospects digitally. For one-on-one discussions, and even small groups, most cellphones have built-in video call platforms, such as FaceTime on iPhones, or Skype on other devices.
- **Go back through your book of business.** Call on any current clients who might have money they want to protect.
- **Find new sales from past prospects** who didn't proceed because the timing was wrong:
 - Past seminar/ workshop attendees
 - Old referrals
 - Previously held clients
 - Former community events you had sponsored

Conduct Interviews Over the Internet

- Client meetings can likely take place on a device you already own. Most laptops are equipped with mics and webcams, or again, you can use your smartphone. The same platforms you used to prospecting, (like Zoom or GoToMeeting,) can work here too.
- **Pick up the phone.** In a technology-dependent world, the personal connections behind a good old-fashioned phone call is making a comeback. Your clients may be glad to hear a friendly voice.
- While it's a medium that has fallen out of fashion in some circles, email is one of the most consistent, cost-effective ways to reach your clients when you cannot see them in-person. Relevant, timely, and useful information can be successfully delivered via email on your schedule. Consider developing a weekly or monthly newsletter with tips and updates on how current events may impact them.

Illustrate Possible Solutions

- Pinnacle Financial Services provides online tools and resources to help see which of several products might be the best fit for your clients' individual situations.
- Our systems are available for you to use whenever and wherever you need them.



Point-of-Sale

Show how your proposed solution addresses their needs.

Make your Pitch from your Place.

- Back to your client via video conference or call, help them understand how the solution you're proposing from a carrier could address their needs.
- Get the agreement on a solution to meet their unique needs.

Use an e-App to Seriously Expedite your Business.

- **Ready to start the application?** Use Pinnacle's e-app agent tools, such as **Connect4Medicare**, as a go-to resource for a streamlined way to get your client moving towards financial stability. Automatically get served the product and state-specific forms you need, plus real-time progress tracking and convenient e-signature capability.
- **How fast in an e-App?** Cash with app cases have money transferred, approved, and in-force all within a matter of hours.