

PROFORMEX CASE STUDY:

Zaverl & Associates, Inc.

The insurance industry is one of the oldest businesses in the world and has proven to be one of the slowest to innovate.

PROFORMEX

InForce Policy Management



THE CHALLENGE

*"Proformex helped
organize my
entire insurance
portfolio and
identified
underperforming
policies that
generated
substantial new sales."*

Having built a successful practice that spans nearly 40 years, it was getting increasingly harder to effectively monitor and service inforce life insurance policies. Over the years, multiple carriers and products were sold, so a solution needed to efficiently monitor and proactively review all their life insurance policies, regardless of carrier or product type.



THE SOLUTION

For the past three years, Proformex has been automatically ordering annual statements and inforce illustrations, tracking individual policy performance, and consolidating portfolio alerts for all life insurance policies. The process has saved time, reduced administration expenses and has identified underperforming life insurance policies which have been modified, replaced, or sold, providing better outcomes to the policy owner and generating new sales revenue for the firm.

Z Zaverl & Associates, Inc.

Since 1980, Zaverl & Associates has been designing comprehensive family blueprints which encompass retirement security, wealth preservation, business succession and legacy objectives as they relate to tax, non-tax and financial strategies. As a Business Succession Strategist for over 26 years, they are uniquely positioned to guide clients through the complex maze of financial, tax and non-tax strategic planning options available under current laws. After thorough consultation, they provide custom-designed strategies that can help achieve personal and business objectives.

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