

FEE ADVISORS NETWORK

A Trusted Resource Partner in Life Insurance & Annuity Planning

Bronze Membership

Level 3

Annual Membership

Bronze Membership provides a discounted value for the Firm that has more than one advisor who desires to work with the Network on cases. The Firm joins under the 'Bronze' membership level, which then provides **unlimited advisors** of the firm to become 'Active' and enjoy all the benefits of a "Charter" member (as listed, under Charter Membership & Benefits). **Bronze Membership** provides access to membership benefits, educational material, concepts and fee guidance through the Members Only section of our website, as well as an initial coaching call for orientation into the fiduciary venue.

Bronze Membership offers the benefits noted below and extended coaching on case development and policy structure. This level is for the Firm who wants to be more aggressive in providing value-added risk management services to their clients and have a trusted partner for fiduciary analysis, design, and/or implementation of life and annuity policies that are created in a "clean room" unbiased environment (via **LIFE 180°**) with **revenue sharing**.**

Bronze Membership Benefits

- **Certificate of Membership**
- **Initial One-On-One Coaching** for orientation of fiduciary concept.
- **LIFE 180° Logo (.jpg format) for marketing on website** or materials. *(Members Only link)*
- **Personal Login to the Members Only link of our website**, which provides access to membership benefits, educational material, fee guidance, newsletter archive, stinger report archive, and other useful information
- **Stinger Reports (via email)** that cover planning strategies and policy style issues.
- **Special "Member Only" webinars & conference calls**
- **Marketing Pieces** *(Members Only link)*
- **TAP (Transitional Action Program)** for business marketing.
- **Life Insurance Fiduciary Ethos®** foundational principles to establish the fiduciary process for risk management issues.
- **New Paradigm 3C's - Efficiency Analysis Form** with automatic calculation *(Members Only link)*
- **Life & Annuity Audit-Pro® System** *(Members Only link)*
- **Life & Annuity Audit-Pro® System Training** *(Call to schedule)*
- **LIFE 180° Policy & Planning Analysis** outsourced to Comprehensive Analytics on a fee-engagement basis. *(includes use of the Template for Life Presentation System © and may include reports from the Life Analyzer © system)*
- **Website Listing under the 'Find an Advisor' Link** - Once qualified. *(Listing Qualification: utilizing the services of Joseph Maczuga for assistance on at least 1 case.)*
- **FAN Member PowerPoint Presentation & Script** *(Members Only link)*
- **Fiduciary PowerPoint Presentation & Script** *(Members Only link)*
- **Discount on Purchase of additional CFIS™ Designations** (WebCE)
- **Discount on Purchase of Life Analyzer® System License**

Additional Bronze Benefits

- **CFIS Curriculum / Designation for One Advisor of the Firm.**
- **Revenue Sharing ****
- **Speaking Fee is Waived** - if the Firm would like to use Mr. Maczuga as a Presenter. *(Travel & Lodging at Firms expense.)*
- **Elimination of \$40 per policy fee** - for summary review of **Red Flag** issues on submitted Life & Annuity Audit-Pro®.
- ◆ **Life Analyzer® - No Charge Outsourcing:** Life Analyzer data input & report supplied by the Network for each case at no additional fee.

** The Revenue Sharing arrangement is 40% of the fees that are quoted for case work. This allocation is based on the fact that the firm is taking ownership responsibility for 40% of the work associated with the case. The firm has control over this portion, with the option of full participation, reduction or waiver of the stated amount. Based on our case activity, Firms can recapture their membership dues with one to three cases. Or, if a firm was to waive participation on cases, the savings in the reduced fees to clients provides for great relationship building.