

# FEE ADVISORS NETWORK



A Trusted Resource Partner in Life Insurance & Annuity Planning

## Charter Membership

### Level 1

#### Annual Membership

**Charter 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.

**Charter Membership** offers the benefits noted below and extended coaching on case development and policy structure. This level is for the Advisor who wants to provide value-added risk management services to their client by having 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** ).

#### Charter 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.)*
- **PowerPoint & Script** - FAN Member PowerPoint Presentation.
- **PowerPoint & Script** - Fiduciary PowerPoint Presentation.
- **Discount on Purchase of CFIS™ Designation** (WebCE)
- **Discount on Purchase of Life Analyzer System License**