

FEE ADVISORS NETWORK



A Trusted Resource Partner in Life Insurance & Annuity Planning

Membership / Quick Look

Membership Levels	Level 1	Level 2	Level 3
Membership Status	Charter	Firm Sponsor	Bronze
Number of Advisors	1	3	Unlimited
Revenue Sharing	N/A	N/A	40% Grid
LIFE-180 Logo for Marketing on Website or Materials	Yes	Yes	Yes
Access to Members Only link	Yes	Yes	Yes
Stinger Report Emails (insights & strategies)	Yes	Yes	Yes
Member Only Conference Calls	Yes	Yes	Yes
Member Only Webinars	Yes	Yes	Yes
TAP (Transitional Action Program) Initiative	Yes	Yes	Yes
Life Insurance Fiduciary Ethos®	Yes	Yes	Yes
New Paradigm 3C's (formatted)	Yes	Yes	Yes
Life & Annuity Audit-Pro® (LAAP)	Yes	Yes	Yes
Life & Annuity Audit-Pro® (LAAP) Training	Yes	Yes	Yes
Template for LIFE® Case Presentation System * which may include reports from the Life Analyzer® System *	Yes *	Yes *	Yes *
Website Listing under 'Find an Advisor'	Yes **	Yes **	Yes **
Website Listing under 'Sponsoring Firms'	No	Yes	Yes
PowerPoint - Member Presentation	Yes	Yes	Yes
PowerPoint - Fiduciary Presentation	Yes	Yes	Yes
CFIS™ Designation (WebCE) ***	\$449 ***	\$449 ***	Yes
Life Analyzer® System License Purchase (& Annual Renewal) ***	\$2,600 (\$1,300) ***	\$2,600 (\$1,300) ***	\$2,600 (\$1,300) ***
Life Analyzer® Training	Upon Purchase	Upon Purchase	Upon Purchase

* Case Analysis Outsourced to Joseph Maczuga through Comprehensive Analytics, Inc.

(These systems are utilized for the recommendations and/or portfolio development reports that address your 'outsourced' case analysis.)

** 'Find an Advisor' Website Listing Qualification: Utilizing the services of Joseph Maczuga for assistance on at least 1 case.

*** These tools are optional and available to our members at the discounted price noted above.

Members can upgrade to a higher level at anytime

The Revenue Sharing arrangement with our Bronze level members is 40% of the fees that are quoted for all 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. Our engagement agreement for this level is specifically structured with full disclosure of the participation. If the firm reduces or waves their participation, disclosure in the agreement allows for the client to be made aware of this additional value-added service. 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 all cases, the savings in the reduced fees to clients provides for great relationship building.