

FEE ADVISORS NETWORK

A Trusted Resource Partner in Life Insurance & Annuity Planning

Platinum Membership

Level 4

Annual Membership

Platinum 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 'Platinum' membership status, 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). **Platinum 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.

Platinum Membership offers the additional 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 client, 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°**).

Platinum Membership Benefits

- **Certificate of Membership.**
- **Personal Login for each 'Active' Advisor** to the Members Only Link of our website, which provides access to membership benefits, educational material, fee guidance, newsletter archive, and other useful information.
- **Marketing Pieces** (*Members Only link*).
- **Life & Annuity Audit-Pro® System** (*Members Only link*).
- **Life & Annuity Audit-Pro® System Training.**
- **New Paradigm 3C's** (*Members Only link*).
- **Special "Member Only" webinars.**
- **Newsletters** (*via email*) which contain articles related to planning concepts, interviews and points of interest.
- **Stinger Reports** (*via email*) that cover planning strategies and policy style issues.
- **LIFE 180°** Policy & Planning Analysis outsourced to Comprehensive Analytics on a discounted fee-engagement basis.
- **Initial One-On-One Coaching** for orientation of fiduciary concept.
- **TAP (Transitional Action Program)** for business marketing.
- **Life Insurance Fiduciary Ethos®** foundational principles to establish the fiduciary process for risk management issues.
- **3C's Efficiency Analysis Form** (*with automatic calculation*).
- **PowerPoint & Script** - FAN Member PowerPoint Presentation.
- **Website Listing under the 'Find an Advisor' Link** - Once qualified.
- **Website Listing under the 'Sponsoring Firms' Link**
- **PowerPoint Presentation & Script** - Fiduciary Seminar Presentation
- **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®.

Additional Platinum Benefits

- **One (1) Proprietary Life Analyzer® System License** - for Firm/Office. *
- **Template for LIFE® Proprietary Presentation System.** Provides case formulation, presentation and conclusions that incorporate policy style descriptions, full disclosure, and recommendations.
- **"On Location" Training & Orientation** session with designated staff of the Firm (no expense to Firm). Training session will include: Life Analyzer® Comprehensive System Training; Template for LIFE® Proprietary Presentation System Training; Life & Annuity Audit-Pro®.

* Additional Life Analyzer® system license(s) can be purchased for separate office locations, if desired. (*Member Price: \$2,600 per license / \$1,300 renewal*)