

Life & Annuity Brokerage
OAKTREE is pleased to introduce

FAST Track CONCIERGE SERVICE



FAST Track Your Next VIP Case

For your most important high premium cases or impaired risk business, you need a service that can help you find the best offer.

- Professional Medical Summary (**at no cost to you!**)
- Single point concierge service throughout the whole process
- Shopped to industry leading insurance companies
- Underwriting negotiations and follow-up
- **Always the TOP COMMISSION!**

It all starts with a professional summary...

The first step in the process is receiving a professional medical evaluation and summary of your client's records (APS's). Insurance companies don't want to sort through endless pages of APS's if they may never see an application. **FAST Track** will obtain a professional summary on your case. A team of professional underwriters will review the medical records and summarize the results for the insurance company's underwriter.

Let them compete for your case...

Once we receive a professional medical summary, your case is sent to a variety of insurance companies that meet your product requirements. Upon review by each company, we will keep track of any offers and help negotiate the right offer with the most competitive product.

Select the product and company and send in the case...

Now that you have received the best offer, you need to have your case guided through the submission and underwriting process. A tentative offer is not worth much if it never gets issued. We will work closely with the insurance company and underwriter to make sure the case makes its way through the new business cycle.

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OAKTREE Call us today!
800-842-9124

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