



MS INSENTRA LLC

# Our Advantage

September 2020

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# MS Inentra LLC

an Insurance Marketing Organization

An independent marketing organization providing risk management and insurance solutions for the independent registered investment adviser (RIA) community.

Affiliated with M.S. Howells & Co., a full-service, registered broker-dealer, with over 20 years of experience servicing institutions and RIAs with personalized, one-on-one customer service.

We value our client's independence while providing professional guidance, support, and flexibility to help them achieve their business model and goals.





# Products & Strategic Carriers

We partner with leading national carriers to provide you with a wide range of product and contract options.

✔✔ Disability

✔✔ Fixed Annuities

✔✔ Group Life

✔✔ Long-Term Care

✔✔ Term Life

✔✔ Universal Life

✔✔ Whole Life



# Sales Cycle Support

## MEDICAL UNDERWRITING & APS SUMMARIES

Medical director resource  
available

## CASE DESIGN & PRODUCT NAVIGATION

Case consulting and product  
expertise for complex situations

## CASE SUBMISSION & SECURE FILE TRANSFER

Automated carrier application and  
underwriting platform



## ILLUSTRATION & PRESENTATION SOFTWARE

Customized and carrier compliant  
illustrations and client presentations

## APS RETRIEVAL SERVICE

Advanced solutions to obtain  
medical records for life insurance

## IN-FORCE POLICY MANAGMENT

Using software built for the life  
insurance industry





# Risk Management Resources



## PRODUCT GUIDES & GRIDS

Product information and comparisons for various UL, IUL, WL, VUL and TL products, riders and more



## ILLUSTRATION RESOURCES

Run your term and permanent illustrations with a single system for multiple carriers and the most popular advanced sale concepts



## FINANCIAL & RATINGS COMPARISONS

For various life insurance carriers



## UNDERWRITING RESOURCES

Guides to help find the best carrier for your case



## CASE DESIGN & CARRIER NAVIGATION

For complex cases, case consultation and product design by professionals with over 25 years of experience in the industry





# Additional Resources

## Calculators & Checklist

We provide helpful checklists and spreadsheets to assist in determining the best sales strategy and to calculate basic income needs, life insurance needs, and estate taxes.

## Medical Doctor

Assess your client's medical risk and underwriting purposes to help you get the case issued quicker and with a more favorable rating.

## Medical Exam Services

Medical Director and Consultant can help assess your client's medical risk for underwriting purposes and help you get the case issued quicker for a more favorable rating.

## Secure File Sharing & Portal Tools

A variety of secure file sharing and portal tools allows you to use any device to securely access files, securely share data (including large files) and create time-saving workflows.







# Compliance & Monitoring

## SureLC

A licensing and contracting automation software that assists in completing required paperwork by multiple insurance companies whenever you need an appointment with a new insurance carrier, or you need a new non-resident appointment.

## Policy Management Tools

Put portfolio oversight and control at your fingertips.

## Secure File Sharing and Portal Tools

Confidentially share information.





# Competitive Pay with Outstanding Service



Direct market access allows us to provide competitive pricing



Assistance in transitioning current fixed life policies to MS Insentra LLC



Detailed reports on overall production and commissions



Commissions applied toward branch minimums under affiliated broker-dealer, M.S. Howells & Co.



We are all about partner relationships and are easily reachable and responsive to your needs





# Strategic Partners

Wealth management involves the accumulation and proper management of your client's financial assets.

Having key strategic relationships with leaders in the industry allows MS Insentra LLC to deliver unsurpassed service and solutions to our clients.

Make risk management and insurance a part of every conversation you have with your clients and prospects.

We have a team of professionals dedicated to helping you succeed.





# Contact Us

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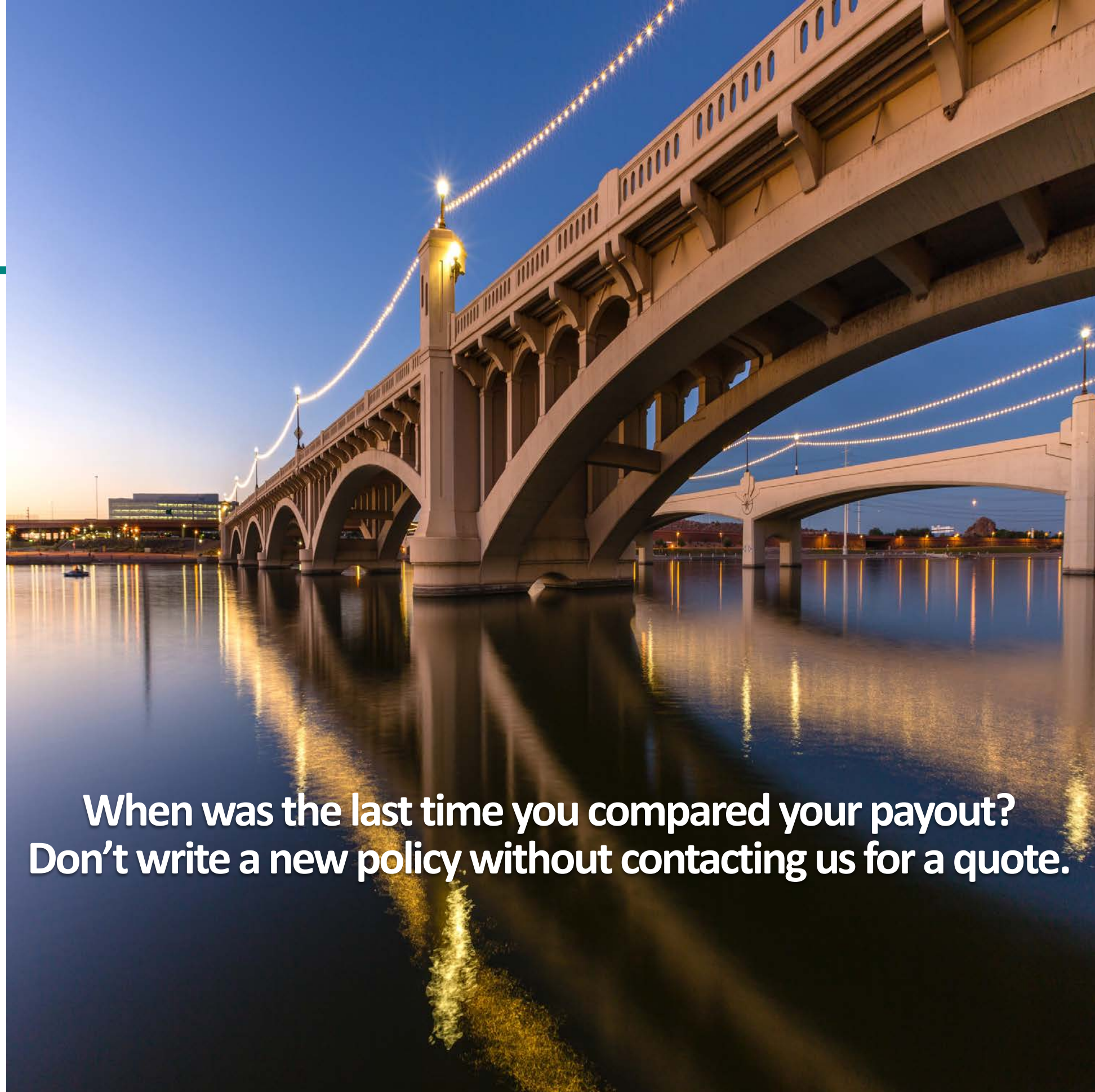
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## ONLINE

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**When was the last time you compared your payout?  
Don't write a new policy without contacting us for a quote.**

