

AN INTRODUCTION TO





**→ 50+ years of combined
Disability Insurance
Brokerage Experience**

Our Mission

The Christensen Agency strives to provide superior product, superior service, and superior sales support to insurance and investment professionals who seek a high-quality mutually beneficial relationship. We pride ourselves on helping you provide financial security for your clients in the event of a disability while saving you time and making you more money.

- 1. Assure our producers a competitive edge in the marketplace through products, case design, underwriting options, and DI industry expertise.**
- 2. Assist our producers in the expansion of their DI markets and growth of their DI business.**



The Christensen Agency

Disability Insurance Brokerage



AMERITAS DISM



Individual Disability Insurance

Business Overhead Expense

Key Person DI

Disability Buy Out

FOCUS 10 Term Life

High Risk Disability Insurance

Loan Repayment Protection

Retirement Security DI

Voluntary STD

Guaranteed Issue DI and BOE

Complete Back Office Support

- ✓ **Advanced Case Design and Support**
 - **Cases designed with your client's needs in mind (cost, contract, riders, etc...)**
- ✓ **Single Source – Multiple Carrier Underwriting**
 - **File Building Capabilities**
 - **Specific Condition Questionnaires**
 - **Informal Inquiry Program**
- ✓ **Licensing and Contracting**
- ✓ **Numerous Illustration Capabilities**
- ✓ **Relationship Driven – Servant's Mentality**

Relationship Driven – Servant's Mentality

Your Team

Dale Christensen

- Sales Support and Training
- Product Specialist
- Case Design
- dale@thechristensenagency.com

Mark Christensen

- Sales Support and Training
- Product Specialist
- Case Design
- mark@thechristensenagency.com

Pamela Averill

- Inside Sales Support
- Office Manager
- Product Specialist
- Case Design
- pam@thechristensenagency.com

Joan Price

- Pending Business Manager
- FIO Increases
- In Force Policyholder Service
- joan@thechristensenagency.com

www.thechristensenagency.com

The screenshot displays the homepage of The Christensen Agency, a Disability Insurance Brokerage. The page features a main navigation menu on the left with links such as 'About Us', 'Contact Us', 'Download / Print Forms', 'Training Material', 'DI / BOE Quote Request', 'Electronic Communications Archive', 'Disability Insurance Terms', 'Useful Website Links', and 'Site news'. A central banner image shows four staff members. To the right, there is a '2012 Elite Conference' section with links for 'Elite Conference Information' and 'Elite Conference Qualification Requirements', a calendar for April 2012, and a 'PDF Resource Materials and Training Material' section. A central text block provides an introduction to the agency, stating it is a Disability Insurance Brokerage office located in Charlotte, NC, representing various insurance companies. At the bottom, there is a 'Sign up for our Electronic Communications' button and a footer with copyright information and a design credit to ADlar.com.

- ✓ Online Quote Requests
- ✓ Applications
- ✓ Underwriting Questionnaires
- ✓ Licensing Forms
- ✓ Sales Materials
- ✓ Web Based Training

Roles and Relationship Examples



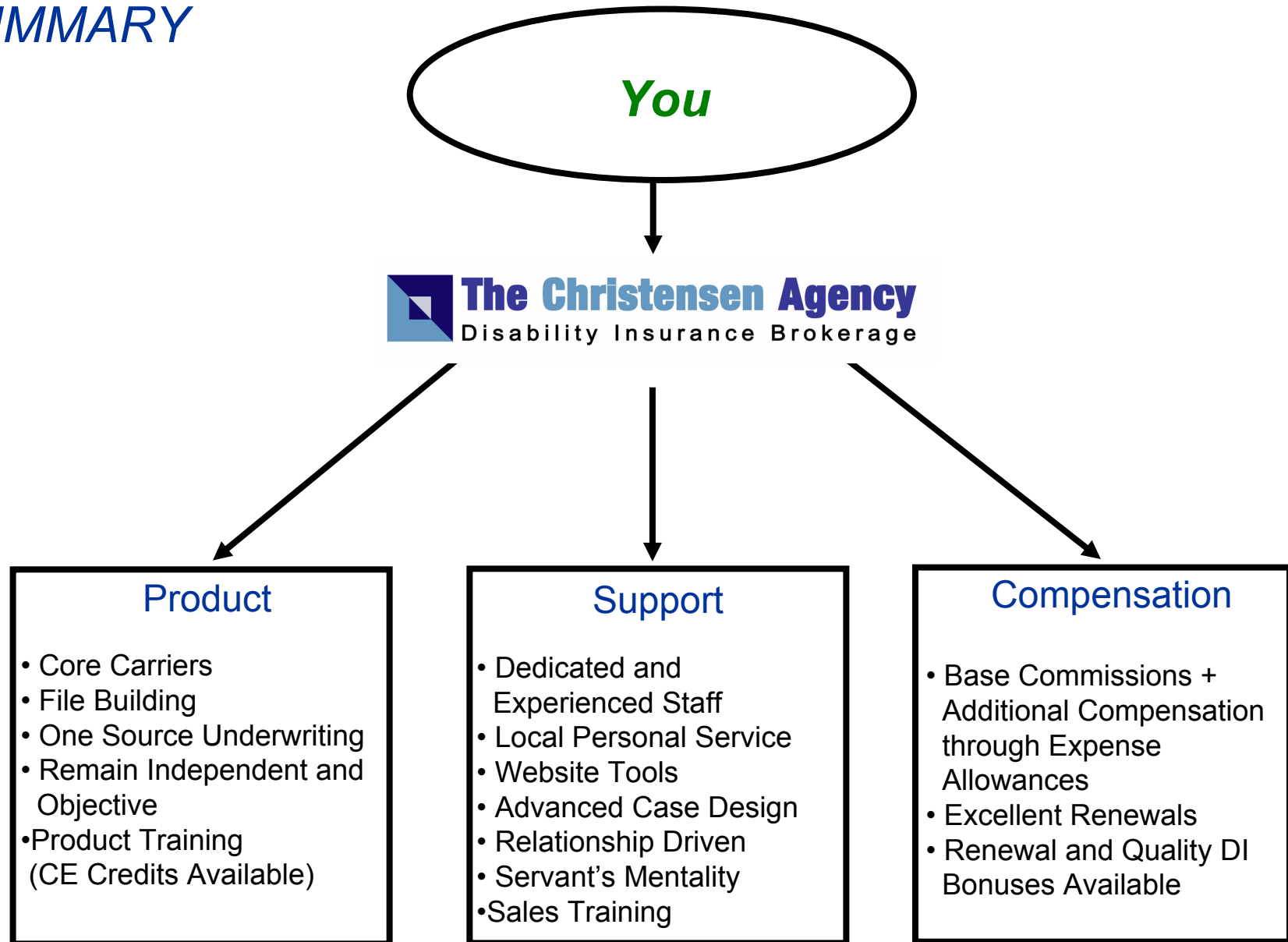
1) Serve as Primary Source for DI Product and Support

- select 1 to 2 core carriers (example Union Central and Principal)
- access to all supporting carriers as needed due to underwriting or product considerations
- maximize compensation through expense level production and qualifying bonuses
- networking opportunities with other Christensen Agency producers
- partnering for mutual success model while maintaining complete independence

2) Serve as Secondary Source for DI Product and Support

- access as needed for specific cases outside of your primary relationship
- specialty products and programs not readily available to you
- traditional brokerage agency model primarily transaction driven

SUMMARY





The Christensen Agency
Disability Insurance Brokerage

Mailing Address

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Charlotte, North Carolina 28247

Physical Address

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Charlotte, North Carolina 28226

Phone Numbers

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