



# Coastal Insurance Consulting, LLC

## Your Onboarding Guide To:

Contracting

Carriers & Products

Marketing

Underwriting

We are a full-service brokerage agency, providing products, marketing, and underwriting support for financial and insurance professionals.

Life

Annuities

Long Term Care

Disability

Coastal Insurance Consulting, LLC  
110 North Phoenixville Pike, Suite 200  
Malvern, PA 19355  
833.CIC.LIFE

## Welcome and Thank You!

We are a full-service brokerage agency, providing products, marketing, and underwriting support for financial and insurance professionals.

CIC has served financial professionals and agencies for more than 30 years, helping take their business to the next level.

We partner with industry leading insurance carriers to offer term and permanent life insurance, disability income, long term care and annuity solutions.

Our specialized service starts with a dedicated marketing team who will assist in tailoring sales strategies to meet your client needs.

[www.coastalic.com](http://www.coastalic.com), our online platform, provides access to industry news, electronic contracting, carriers and products, marketing resources, underwriting, quotes, business submission and case management.

Once your new business is formally submitted, we assign a dedicated case manager who will oversee your case from start to finish, application receipt through policy delivery. Your cases are always available to review online through our case status portal, and our case managers provide weekly status updates as well.

Our team also consists of a contracting and commissions specialist who is also available to answer questions regarding licensing, contracting, state requirements and commissions.

**Welcome and thank you for choosing CIC as your agency partner.**

**Mike Driscoll**

Co-founder, CEO

**Brendon Healy**

Co-founder, President



# Let Our Team Be Your Team

## CIC Leadership

Mike Driscoll, CEO	484.873.8501
Brendon Healy, President	484.873.8502
Michele Fisher, VP Marketing	484.873.8283
Rose D'Alesandro, VP Operations	484.873.8507

## External Sales Managers

Austin Maniscalco	484.873.8503
Frank McVeigh	484.873.8286

## Internal Sales Support

Bailey Wineberg	484.873.8511
Frank McVeigh	484.873.8286

## Disability Income Specialist

Matt Ruskin	484.873.8504
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## Case Managers

Kieran Cannon	484.873.8508
Tom O'Keefe	484.873.8509
Eric Driscoll	484.873.8285

## Contracting and Commissions

Susan Dougherty	484.873.8510
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## Office Information

110 Phoenixville Pike, Suite 200 Malvern, PA 19355

833.CIC. LIFE (833.254.5433)

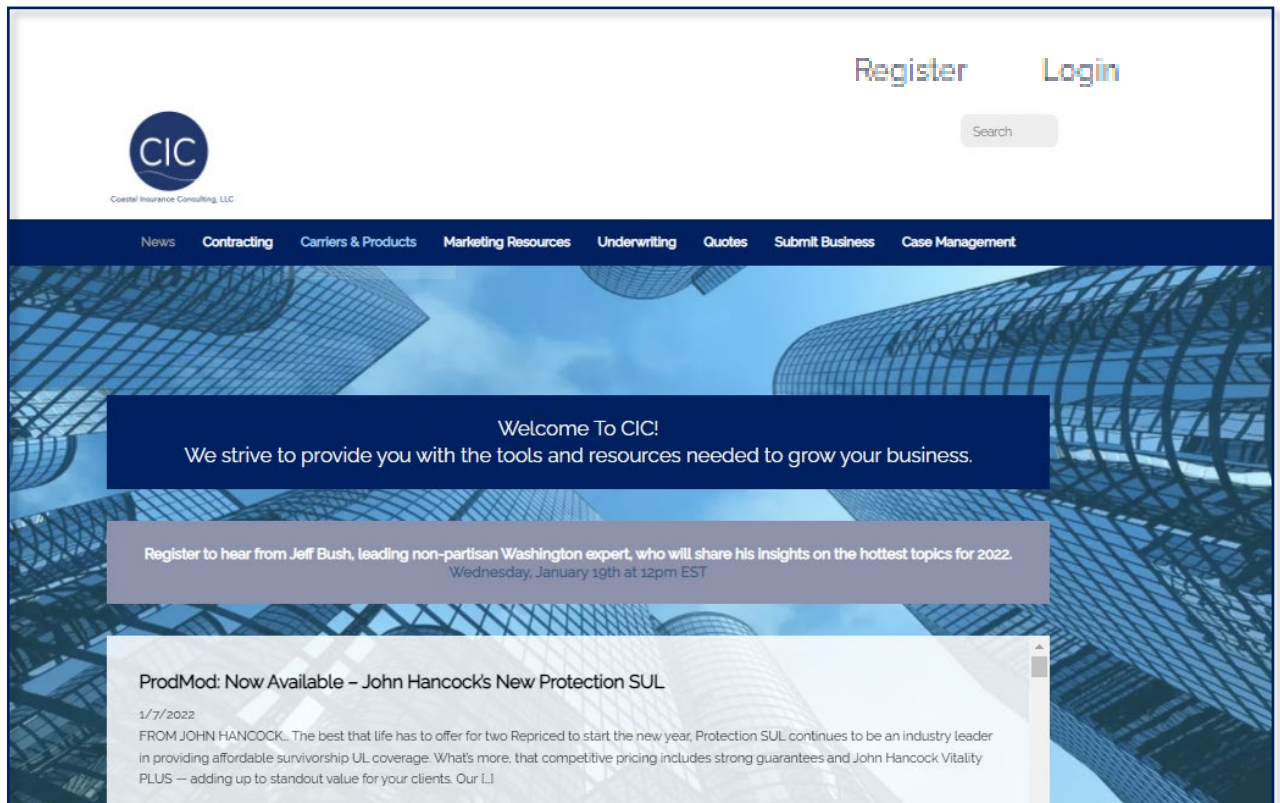
Fax 215.494.3655



Let's Start Growing Your Practice

Start by registering with us at

[www.coastalic.com](http://www.coastalic.com)



The registration is easy and is the first step  
to access all tools and resources.

Click Here and Follow Us On



For industry news and marketing  
strategies.



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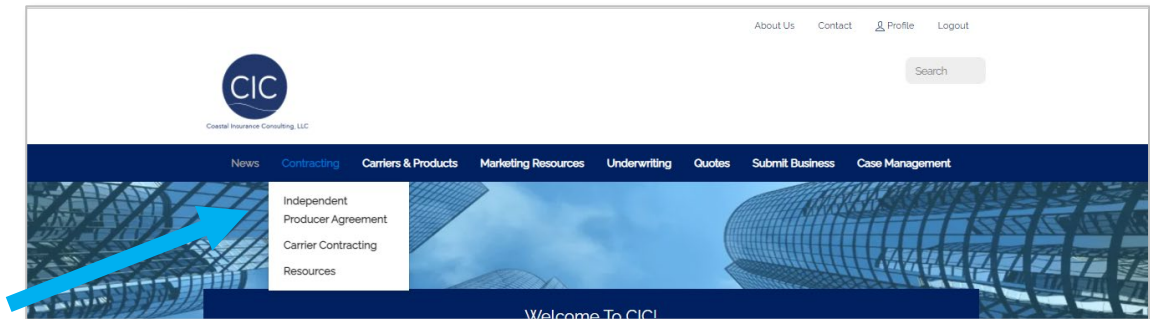
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2022

page 4

# Congratulations! Let's Get Contracted!

Now that you've registered for our website you can contract with one or multiple insurance carriers.



1 Along the top navigation bar, click on **Contracting**.

2 Next, click on **Independent Producer Agreement (IPA)**, scroll to bottom and apply signature by drawing with your mouse. A copy of the IPA will be emailed to you for your records.

3 Click on **Carrier Contracting** and proceed to **SureLC**.



When you first log on to SureLC, you will create a profile. If you have logged onto SureLC previously, using another brokerage general agency (BGA), click **Recover Your Account Credentials**. SureLC is linked to NIPR so majority of info should auto-populate.

Click **Contracting Requests** on the left navigation bar and search for carrier and follow prompts to submit new request.

## PLEASE NOTE:

- Agents are required to hold an active insurance license in state of solicitation, prior to product application submission.
- Agents are required to be appointed with the carrier, when submitting new business.
- Appointment and application can be submitted together, unless carrier or state requires pre-appointment. See [Pre-Appointment States](#).



# Access To More Than 35 Industry Leading Insurance Carriers



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[About Us](#)

[Contact](#)

[Profile](#)

[Logout](#)

[News](#)

[Contracting](#)

[Carriers & Products](#)

[Marketing Resources](#)

[Underwriting](#)

[Quotes](#)

[Submit Business](#)

[Case Management](#)

Our premier carriers offer legacy, asset, and income protection for your client, their families, businesses, and investments.

Carrier	Life Insurance	Annuities	Hybrid LTC	Disability Income
<a href="#">Allianz</a>	X			
<a href="#">AIG</a>	X	X		
<a href="#">American Equity</a>		X		
<a href="#">American National</a>	X	X		
<a href="#">Ameritas</a>	X			X
<a href="#">Atlantic Coast Life</a>		X		
<a href="#">Banner</a>	X			
<a href="#">Equitable</a>	X			
<a href="#">EquiTrust</a>		X		
<a href="#">Foresters</a>	X			
<a href="#">F&amp;G</a>	X			
<a href="#">Global Atlantic</a>	X	X		
<a href="#">Great American</a>		X		
<a href="#">Guardian</a>	X			X
<a href="#">Guggenheim</a>		X		
<a href="#">Integrity</a>		X		
<a href="#">John Hancock</a>	X			
<a href="#">Lafayette Life</a>	X	X		
<a href="#">Legacy Marketing</a>				
<a href="#">Lincoln Financial</a>	X	X	X	

Carrier	Life Insurance	Annuities	Hybrid LTC	Disability Income
<a href="#">MassMutual</a>	X		X	X
<a href="#">Mutual of Omaha</a>	X	X	X	
<a href="#">National Life</a>	X			
<a href="#">Nationwide</a>	X		X	
<a href="#">New York Life</a>	X			
<a href="#">North American</a>	X	X		
<a href="#">OneAmerica</a>	X	X	X	
<a href="#">Oxford Life</a>		X		
<a href="#">Pacific Life</a>	X			
<a href="#">Petersen International</a>				X
<a href="#">Principal</a>	X	X		X
<a href="#">Protective</a>	X	X		
<a href="#">Prudential</a>	X			
<a href="#">SBLI</a>	X			
<a href="#">Securian</a>	X		X	
<a href="#">Sentinel Security</a>		X		
<a href="#">Symetra</a>	X	X		
<a href="#">Transamerica</a>	X			
<a href="#">Zurich</a>	X			

The most current list of carriers and products can be found at [www.coastalic.com](http://www.coastalic.com).



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2022

page 6

# Marketing Resources

In addition to industry leading carriers, products and marketing strategies, we partner with industry experts to provide you with additional support around these concepts:

- Premium Finance
- Medicare Enrollment
- Life Settlements
- Inforce Policy Management Tools

The screenshot displays the Marketing Resources page with a navigation bar including News, Contracting, Carriers & Products, Marketing Resources, Underwriting, Quotes, Submit Business, and Case Management. A search bar is located in the top right. A blue arrow points to the Marketing Resources menu item. Below the navigation are icons for Life and Annuity, Long-Term Care, and Disability. The main content area features several sections: Case Studies with buttons for Guaranteed Retirement Income, Indexed Universal Life, Guaranteed Variable Universal Life, and Funding LTC with Qualified Dollars; Premium Finance featuring Northstar Funding Partners; Medicare featuring mymedicarepro; Life Settlements featuring Abacus Life; and Inforce Policy Review featuring Proformex and NIC.

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# Marketing Resources

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Search

[News](#) [Contracting](#) [Carriers & Products](#) [Marketing Resources](#) [Underwriting](#) [Quotes](#) [Submit Business](#) [Case Management](#)

Case Studies  
**Club APEX**  
Premium Finance  
Medicare  
Life Settlements  
Inforce Policy  
Review

Exclusive Membership  
for our Elite Producers  
with commitment of  
\$150,000 annual  
production credit



Club APEX recognizes our top producers

\$150,000 annual credited premium commitment

Contact your brokerage manager or [Michele Fisher](#) for details.

### Leadership and Incentive Trips

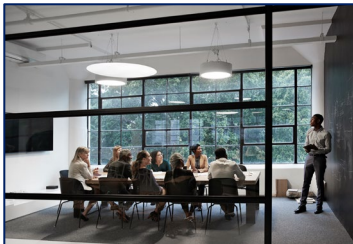
- Connect and leverage other top agents
- Celebrate your successes
- Grow your business

### Business Building Ideas

- Growing a successful annuity practice
- Premium financing opportunities
- Industry updates
- Retirement income pyramid
- Perspectives from top producers

### Networking Events

- Network and celebrate success
- Eligo™ Elite Golf Country Club Access
- Fall football weekend events
- Year end holiday party





# Charitable Giving and Community Involvement

We feel strongly that as members of this industry, we have the capability to protect clients from risk, improve quality of life, and positively change lives.

This effort includes a desire and commitment to help charitable organizations that are important to our employees, our advisors and our communities. Our goal is to contribute a percentage of company revenue and encourage all of our employees to volunteer and give back.



Here is a representative list of the organizations and opportunities that we work with today.



Coastal Insurance Consulting, LLC