



# 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



Coastal Insurance Consulting, LLC

## Let Our Team Be Your Team

### CEO

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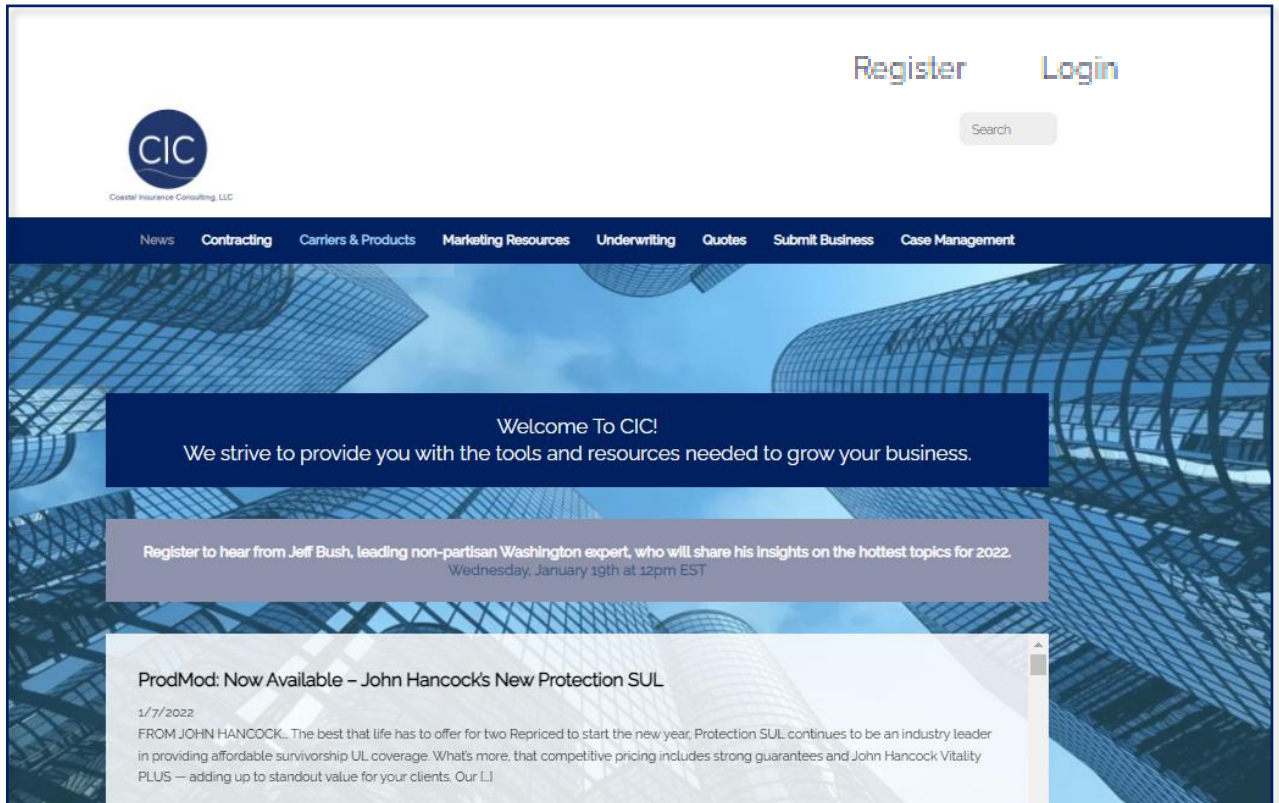


Coastal Insurance Consulting, LLC

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



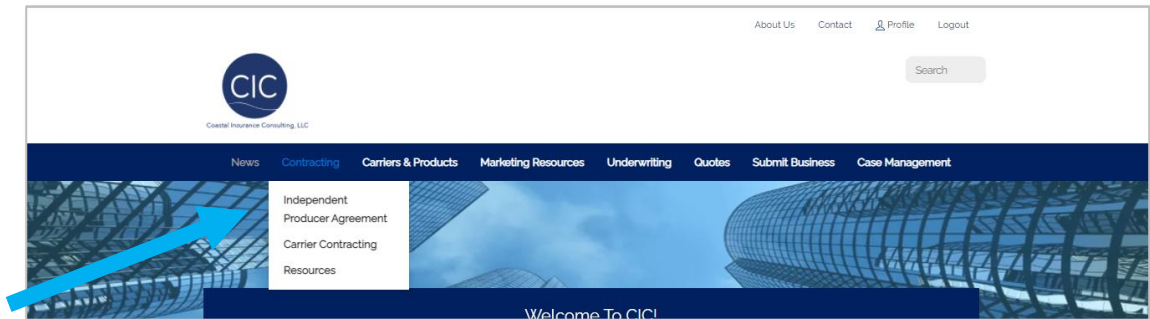
For industry news and marketing strategies.



Coastal Insurance Consulting, LLC

# 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



Coastal Insurance Consulting, LLC

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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).



Coastal Insurance Consulting, LLC



# Marketing Resources

Marketing Resources

- Case Studies
- Club Apex
- Premium Finance
- Medicare
- Life Settlements
- Inforce Policy Review

Life and Annuity | Long-Term Care | Disability

### Case Studies

- Guaranteed Retirement Income
- Indexed Universal Life
- Guaranteed Variable Universal Life
- Funding LTC with Qualified Dollars

### Premium Finance

**NORTHSTAR**  
FUNDING PARTNERS

Leading experts in premium financing who have provided life insurance solutions for 20 years and have funded more than 1,000 transactions for financial service professionals.

[Click Here To Learn More](#)

### Medicare

**mymedicarepro**  
medicare planning simplified

Operating as a business and acting as a trusted partner to Financial Planning firms across the nation, MyMedicarePro provides comprehensive and customized Medicare Planning and enrollment services for clients nearing Medicare eligibility, including assessment.

[Click Here To Learn More](#)

### Life Settlements

**ABACUS LIFE**  
OPTIONS FOR YOUR LIFE INSURANCE

We work with several institutional funders to ensure that the offers we issue on cases reflect real value. Rather than making offers from a single money source, we maximize the potential of your life insurance by using different funds. This is reflected in Abacus Life's transparent and competitive pricing for every single case. We pride ourselves on being able to understand the finer details of the cases we take on.

[Click Here To Learn More](#)

[Click here to access our Life Settlement Calculator](#)

### Inforce Policy Review

**PROFORMEX**

Proformex delivers medicare viability, distributor collaboration and performance reporting for advisors and brokers in a single secure platform.

**NIC**

NIC for agents offers a single platform that provides access and insights into your book of business with inforce data from multiple carriers and distributors.

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

# Marketing Resources

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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

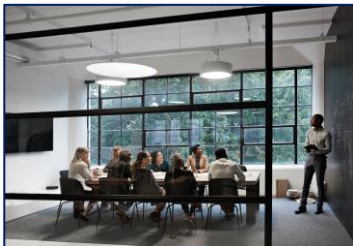
- Connect and leverage other top agents
- Celebrate your successes
- Grow your business

### 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



Coastal Insurance Consulting, LLC



# 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.



High School  
Academic Athletic Scholarships



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

