Coastal Insurance Consulting, LLC
A Simplicity Company

Welcome to CIC – Overview of Services

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Section 1: Welcome to CIC - A Simplicity Company

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Welcome and Thank You!

Thank you for choosing CIC. We have served financial professionals for more than 30 years. In 2022, CIC became a Simplicity company, which means we significantly expanded the tools and resources to take your business to the next level.

In addition to the core team, which is based in Malvern, Pennsylvania, we have the power of Simplicity Financial Group to provide innovative and automated marketing ideas, leading insurance carriers and advisor technology.

Additionally, we offer more than 20 virtual and in person events annually, to increase your knowledge, build your brand, attract new clients, and ultimately drive additional revenue for your organization.

We can also offer FIA and Variable Life products to more than 17,000 registered advisors. Talk to us about our broker dealer approved products.

Section 1: Welcome to CIC - Meet The Team

Coastal Insurance Consulting, LLC
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Partners

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Section 1: Welcome to CIC – Representative Carrier List

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Carrier List

SIMPLICITY GROUP

Carrier	AM Best Rating	NY	Fixed/Fixed Index Annuity	Variable/ RILA	Life	LTC/ Hybrid	DI
Accordia Life	A				●		
AGLA	A				●		
AIG	A	●	●			●	●
Allianz	A+		●		●		
American Equity	A-	●	●		●		
American General	A	●	●		●		
American National	A	●	●		●		
Americo (Legacy)	A	●					
Americo (Shelf)	A		●				
Ameritas (Legacy)	A		●				
Assurity	A-		●		●		
Athene/Annexus	A		●				
Athene National	A	●	●				
Atlantic Coast Life	B++		●				
AXA Equitable Life	A	●			●		
Banner Life (Legal & Gen)	A+				●		
Columbus Life	A+		●		●		
Delaware Life	A-		●		●		
Equitable Life	NR		●				
Equitrust	B++		●		●		
F&G Life	A-	●	●		●		
Foresters	A	●			●		
Forethought	A				●		
Genworth	C++	●	Servicing Only		●	●	
Gerber Life	A				●		
GILICO	B++						
Gleaner Life	A-		●				
Global Atlantic/Forethought Life	A		●				
Great American	A+		●	●	●		
Guaranty Income Life	B++		●				
Guggenheim Life & Annuity	B++		●		●		
Integrity Life	A+	●			●		
John Hancock	A+	●			●	●	
Knighthead Annuity International	A-		●				
Lafayette Life	A+		●		●		
Legacy Marketing	NR				●		
Liberty Bankers Life	B++	●	●		●		
Liberty Life	NR				●		
Liberty Mutual	A						
Life of the Southwest	A	●			●		

Carrier List

SIMPLICITY GROUP

Carrier	AM Best Rating	NY	Fixed/Fixed Index Annuity	Variable/ RILA	Life	LTC/ Hybrid	DI
Lincoln Financial Group	A+	●	●		●	●	
Lloyds of London					●		
LSW/National Life Group	A+		●		●		
Mass Mutual	A++				●		●
Met Life	A+				●		●
Minnesota Life	A+		●		●		
Mutual of Omaha	A+		●		●	●	●
Mutual Trust Life	A		●		●		
Nassau RE	B+	●	●	●	●	●	●
National Guardian Life	A		●		●		
National Life Group	A						
National Western Life	A		●		●		
Nationwide	A+		●		●		
New York Life	A++		●		●		
North American	A+		●		●	●	
Oceanview	A-		●				
OneAmerica	A+				●	●	
Oxford Life	A-		●		●		
Pacific Life	A+		●		●		
Penn Mutual	A+		●		●		
Principal	A+	●	●		●		●
Prosperity Life	A-		●		●		
Protective Life	A+		●		●		
Prudential	A+		●		●		
Reliance Standard	A+		●		●		
Royal Neighbors	A		●		●		
Sagicor	A-		●		●		
SBLI	A	●			●		
Securian	A+						
Security Benefit	A-		Servicing Only		●		
Sentinel Security Life	B++		●		●		
The Standard	A		●		●		●
Symetra	A		●		●		
Transamerica	A		●			●	
Upstream	B++		●				
US Life	A	●	●		●		
Venerable (Formally VOYA)	NR		Servicing Only		●		
W&S Financial Group	A+						
William Penn Life	AA-				●		
Zurich	A+				●		

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Check with our team for the most up to date list.

Section 2: A Partnership That Delivers

Coastal Insurance Consulting, LLC
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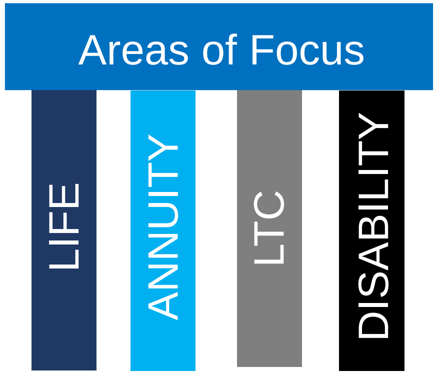
1. Relationships

Relationships are the foundation of your business and ours. At CIC, our structure allows us to provide you with the personalized attention you deserve, while cultivating carrier relationships that provide you with access to first-rate and proprietary products and training.

2. Specialization

In partnership with Simplicity, CIC has made significant investments to provide you with the resources needed to succeed in today's competitive landscape. Our **areas of focus** are designed to provide you with the specific tools to grow your business.



3. Execution

Start to finish, from marketing through policy delivery, our team works with you every step of the way to partner and grow your business.

RESOURCES

- Strategic Marketing Plans
- Lead Generation Programs
- Strategic Partnerships
- Sales Events and Training
- Client Referral Programs

Section 3: Marketing Resources and Support

Coastal Insurance Consulting, LLC
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Solutions

Together we will review our full offering of business building marketing programs we can offer to your financial professionals.

Marketing programs*

Maximizing SOCIAL SECURITY

THE Truth ABOUT ANNUITIES

Principles of Retirement Planning

Tax-Free Retirement

*Additional programs and resources available

Execution and Support*:

We have a full suite of supporting materials that go along with our marketing programs, including:

- Execution Guides
- White Papers
- Presentations
- And more!

*All based on your compliance guidelines and procedures

Section 3: Marketing Resources and Support

CIC
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Execution

- Resources
- Tools
- Training
- Marketing
- Processes

Branding

Logo Creation

Branded Collateral

Banners

Flyers

Event Materials

Digital/Video

Websites

Custom Video Production*

Virtual Tools

Content

Dynamic Content

Consumer Facing Videos

Social Media Resources

Lead Generation

Maximizing Social Security

Principles of Retirement Planning

Truth About Annuities

Tax Free Retirement

Section 3: Marketing Resources and Support

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Complete Back-Office Support:

- Leading Product Selection
- Training & Education
- Business Technology
- In-field support
- Marketing Solutions
- Case Management
- Advisor Portal

Section 4: Advisor Tools and Resources - Technology

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Enhanced Technology:

Our partnership brings you technology that creates greater efficiency for you

CANNEX	SPIA illustrations powered by Cannex
BEACON ANNUITY SOLUTIONS	This data warehouse is available for currently marketed and closed products - providing you with the information necessary to fully evaluate the annuity product
ENSIGHT™	Proprietary software that demonstrates the power of IULs using storytelling and personalized data.
FireLight® By INSURANCE TECHNOLOGIES	End-to-end online client application tool
SURANCEBAY INSURANCE. SIMPLIFIED.	Online appointment tool for licensing & contracting
IPIPELINE® INNOVATION UNLEASHED	Electronic Forms Engine

Section 4: Advisor Tools and Resources - Education

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Training Events:

These events are geared towards enhancing financial professional practice by sharing featured carrier partner updates, as well as providing training on marketing programs that are working in the current environment.

ADVISOR TRACK

Events | Recruiting Opportunities | Contracts Required*

Virtual Sales Forums - Life
Simplicity Life University

ANNUITY | LIFE | LTC

Events | Production Opportunities

Advanced Sales Training

Advanced Training Events (product and channel agnostic)

Consumer-Facing Marketing Programs | Growth/Retention Opportunities

Our consumer-facing marketing programs are fully equipped with advisor trainings, support materials and best practices that allow for effortless execution.

Maximizing Social Security
Educational workshop provides fundamental knowledge of the Social Security benefit program as it applies to overall retirement and income planning.

Principles of Retirement Planning
Turkey Sales seminar system designed to educate consumers on the importance of protecting the income for what they need in retirement, so they can maximize the income for the things they want in retirement.

Truth About Annuities
Turnkey sales seminar system designed to help you attract a highly-targeted audience of motivated annuity buyers.

Tax-Free Retirement
Turnkey, multi-media prospecting program created by financial professional and author Patrick Kelly, which positions you as the subject-matter expert on tax planning for retirement.

Plan Now LTC
LTC-focused marketing program makes you the expert in your area with turnkey resources, training, and marketing systems for growing your Asset-Based LTC business.

And Much More…
We support our agents/advisors with branding services, turnkey referral strategies, customized websites, industry content that can be used across many platforms including social media, and marketing consultation to help create successful plans and effective campaigns.

Section 5: Access To Industry Expertise

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Specialized Expertise:

We have partnered with the foremost industry experts to drive revenue for your business and meet changing client needs.

Simplicity Wealth: For financial advisors that want to simplify your investment business with one platform.

Newcleus: Strategic design for executive and employee compensation plans

Abacus Life: Largest direct provider in the life settlement industry. If a life insurance policy no longer meets your client's needs, Abacus may be able to find an alternative solution.

NIC: In force innovation for the life insurance industry.

mymedicarepro: Leading, trusted resource for Medicare planning.

ilia / Kai-Zen: Leverage, protect and grow your retirement. Kai-Zen is designed to minimize expenses and maximize accumulation potential.

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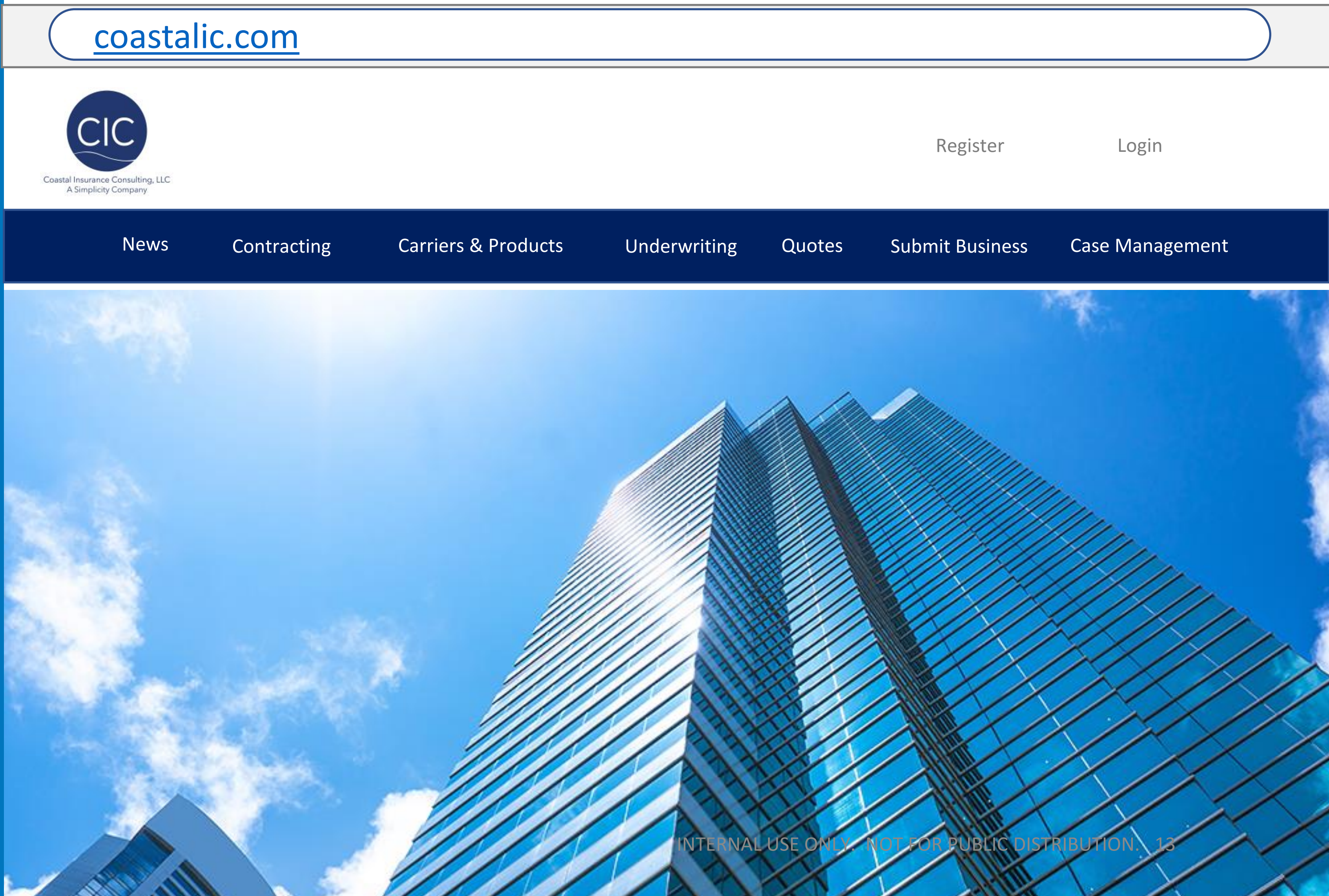
Everything Starts Here:

1. Register at coastalic.com
2. You will receive immediate access to our tools and resources.
3. Click on Contracting – it’s easy to set up your CIC producer agreement and carrier contracting.
4. Our team will schedule an onboarding walk through session to make sure you have everything at your fingertips.



Section 7: From Application Submission and Beyond

Coastal Insurance Consulting, LLC
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Leading Capabilities:

1. We work with leading carriers, and underwriters to ensure you can offer your clients products that align with their needs and lifestyles.
2. You can run quotes, access fillable forms, complete electronic submission and see case status 24/7 from our advisor platform.
3. Our in-house case management team coordinate all the necessary steps to issue cases efficiently and in a timely manner.

coastalic.com

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Register Login

News | Contracting | Carriers & Products | Underwriting | Quotes | Submit Business | Case Management

Contact Information

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