



# How to write annuity business with URL

## Sales support specialists

Case design and product determination, illustration support, marketing assistance, advanced sales support, and product training assistance.



*Maria Adams x102  
Agent Support Specialist*



*Jason Collins x156  
Agent Support Specialist*

## Case management

Scrub applications, follow new cases from submit to issue, and policy service support.



*Cody Wilbert x136  
Agent Support Specialist*

## Management

Marketing and advertising and support, advanced sales, and prospecting programs.



*Joe Corio x111  
Senior Vice President*



# How to write life business with URL

## Sales support specialists

Illustration support, case design, quoting, underwriting risk assessments, marketing assistance, product and marketing training, education, advanced sales support and more.



*Matt Allina x141  
Final Expense Manager  
Specializing in final expense and underwriting.*



*Joey Frey x157  
Agent Support Specialist  
Specializing in disability, long term care, permanent life and illustrations.*

## Case management

Scrub applications, assist with paramed and application ordering, follow the case from submit to issue, enforce inquiries and more. Over 28 years of combined case management experience.



*Rosemary Evans x127  
New Business Specialist A-L*



*Rachel Patton x130  
New Business Specialist M-Z*

## Management

Agency contracts, marketing programs, and advanced sales.



*Steve Clemens x132  
Vice President*



# How to write health business with URL

## New business

New business quotes for health insurance.



*Katrina Weisman x159  
Group Health  
New Business Specialist*



*Justin Miller x128  
Group Health  
New Business Specialist*



*Judy Reid x104  
Individual Health  
New Business Specialist*

## Compliance & Notices

Daily oversight of group health insurance new business, wrap SPD & POP creation, employer benefit notices, escalated group health issues.



*Elyse Frey x114  
Group Health Manager*

## Administration

Administration for AdminCenter groups, and groups on our benefit administration platforms.



*John Rheel x118  
AdminCenter Specialist*



*Lindsey Landis x126  
AdminCenter Specialist*



*Susan Purcell x120  
AdminCenter Specialist*

## Management

Higher-level compliance & ACA information.



*Deb Wilkinson x113  
Vice President of Health  
Plan Options*



# How to write Medicare business with URL

## Agent Support Specialists

Product and marketing training, education, advanced sales support, product quotes and more.



*Alyssa Balkcom x149  
Agent Support Specialist*



*Janine Rehkop x112  
Agent Support Specialist*

## Orion Enrollment Specialist

Medicare Advantage Plan, Medicare Advantage Special Needs Plan, Medicare Supplement Insurance Plan, Part D Prescription Drug Plan, and senior ancillary sales supporting the Orion platform.



*Lindsey Litten x116  
Agent Support Specialist*

## Management

Agency contracts, marketing programs, compliance, escalated issues, and new agent recruitment.



*Karen McDaniel x117  
Director of Operations & Compliance*



*Christy Wilbert x152  
Director of Marketing*