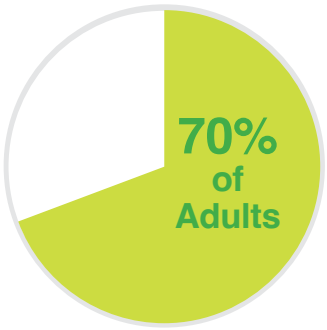
Uncovering New Business Opportunities with Long-Term Care

STEP 1

Our simple approach to long-term care planning can keep you ahead of the curve. We make it easier to prepare for and initiate client conversations that lead to long-term care opportunities.

This guide will help you identify ideal client prospects for LTCi and provide you with the information you need to initiate the conversation with them. Additionally, our dedicated practice support team is here to help you in your efforts.



**70% of adults who survive to age 65 develop severe Long Term Services and Supports (LTSS) needs before they die, and 48% receive some paid care over their lifetime.*

4 Simple Steps to Uncover New Business

STEP 1

IDENTIFY LONG-TERM CARE PROSPECTS

- Reference our **Who is my Target Client** flyer to find ideal prospects
- Learn more about the target personas and how to approach each group

STEP 2

TALK TO CLIENTS ABOUT THEIR FUTURE PLAN

- Review our **Long-Term Care Conversation Starters** for proven ways to approach the topic with your clients.
- Introduce the need for a plan and pivot to available solutions

* https://aspe.hhs.gov/reports/what-lifetime-risk-needing-receiving-long-term-services-supports-0

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STEP 3

UNDERSTAND CLIENTS' FINANCIAL GOALS, PREFERENCES AND MEDICAL HISTORIES

- Complete our **Long-Term Care Needs Assessment and Cost Estimate** worksheet with clients to capture their needs and medical conditions
- Schedule a follow-up appointment to present a custom plan
- Address potential risk for policy qualification, based on our **Long-Term Care Underwriting Guide**

STEP 4

DEVELOP A PLAN WITH OUR TEAM

- ltcsolutions@concoursefinancial.com
- How long will it take for them to receive the illustratrions
- To request contracting, email contracting@concoursefinancial.com to request product training email LTCsolutions@concoursefinancial.com
- Use our simple online process to submit business. Once appointed, you will have access to our Concourse website where i pipeline is single sign on.

READY TO MOVE TO THE NEXT STEP Once you have completed the steps above use the: **WHO IS MY TARGET CLIENT** to Move to the Next Step in the process.

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