

Report name: NAIFA 2013 Exhibitor List
Report date: Thursday 04/18/2024
Event name: NAIFA 2013
Total records: 86 records

Exhibitor Company	Booth number/ref	Exhibitor Website	Company Description
3Mark Financial	526	www.3mark.com	3Mark Financial is a national, operations-centered marketing organization dedicated to delivering quality insurance and financial services to the marketplace, while creating substantial and lasting value to our producers and affiliate partners.
Accelemark	427	www.accelemark.com	Accelemark is a Direct Mail, Seminar Marketing & Lead Generation Company that also offers seminar consultation a Reservation Line. Our CEO is an Advisor so we know what needs to be done to truly grow your business. We are an Advisor's lead generation partner, acting as a consultant through the entire process sharing best practices and proven results.
Advisor Solutions	418	http://advisor-solutions.com/	Advisor Solutions business consulting & coaching services are an ongoing professional relationship that helps financial advisors produce extraordinary results in their lives, careers, businesses and organizations. Through the process of business consulting with Advisor Solutions, our advisor clients deepen their learning, improve their performance, and enhance their quality of life. Our mission with Advisor Solutions is to give financial advisors successful tools, techniques, camaraderie and ancillary learning to succeed in each of the eight most important facets of a financial advisory business; time management, prospecting, sales, relationship building, client servicing, marketing, product knowledge and portfolio management.
Advisor Today	518	www.advisortoday.com	Founded in 1906 as Life Association News, Advisor Today is the official publication of the National Association of Insurance and

Advisors Assistant

213

www.AdvisorsAssistant.com

Financial Advisors. Our mission is to provide practical information, sales ideas and business strategies to help insurance and financial advisors succeed.

Advisors Assistant – The Leader in Client Management Software for the financial services industry since 1985. It increases sales, helps build strong relationships, and streamlines office efficiency. Advisors Assistant makes it easy to stay in touch with clients and prospects on a regular basis to build rapport and keep them from straying to other advisors. Direct links to Microsoft Word and Outlook make communicating with clients and prospects a snap. Add the Optional Insurance and Commission Modules or the Optional Investment Module to track investments. Document Storage also available. Choose either Web Based or Computer Based – We Have Both! FREE 800 Line Support, Updates, & Training. SPECIAL DISCOUNT for NAIFA Members.

Advisors' Academy, LLC

506

<http://advisorsacademy.com>

Advisors' Academy was founded in 2007 by David Scranton with a vision to recruit other highly successful, motivated advisors and teach them how to achieve even higher levels of success! Everything we do is designed to help advisors achieve quantum leaps in the shortest time possible, while helping their clients grow and protect their hard-earned money. Our one and only goal is the success of our advisors – and we insure that with the industry's only money-back guarantee. Through ongoing personal coaching and training in a variety of innovative, market-proven systems and turnkey tools, hundreds of elite advisors from across the country are now sharing in the realization of Dave's vision.

AFG Brokerage

225

www.AFGBrokerage.com

Many brokerage firms get rich at the expense of your hard work and effort but at AFG Brokerage we have a different way of

APPS Paramedical

320

appslive.com

thinking. "KEEP WHAT YOU EARN" is our philosophy because we believe in the financial success of all of our agents and producers. AFG Brokerage was established in 2008 with the commitment to provide agents and producers contracts with maximum compensation and full commission disclosure. Partnering with us will give you access to the greatest life insurance carriers, an experienced and knowledgeable staff, a robust portfolio of product offerings, and resources and tools to simplify the sales process.

APPS is the only paramedical vendor in the country that is 100% dedicated to providing paramedical exams for the life, group life, disability income, and health insurance industries, with over 100 offices nationwide. APPS' mission is to provide exceptional paramedical services to our clients for the purpose of underwriting risk. APPS' strategy is to leverage technology to provide high-quality, fast turn-around, and responsive service to field agents and underwriters. At the forefront of our technological advances is our Smart Paramed, the first laptop collected paramedical exam. Using comprehensive drill down and pop-up scripting, Smart Paramed ensures 100% in good order data and image, delivered within seconds of completion

Assurant Health

300

www.assuranthealth.com

Assurant Health products focus on providing affordable plan choices to consumers, including major medical, supplemental and fixed-benefit plans for individuals, families and small employers. Assurant Health is committed to providing access to convenient, easy-to-understand products that help customers better manage their health care dollars. Assurant Health's products are underwritten and issued by

Brokers International, Ltd.

513

www.biltld.com

John Alden Life Insurance Company and Time Insurance Company, which has been in business since 1892. Headquartered in Milwaukee, Wisconsin, Assurant Health employs approximately 2,000 employees.

Brokers International, Ltd. is one of the nation's largest and longest standing insurance marketing organizations. Originally founded in 1955 by industry legend Roger McCarty, Brokers International, Ltd. remains an independently owned and family operated organization focused on meeting the varying needs of independent insurance and financial professionals. By working with Brokers International, Ltd., you'll have access to annuity and life insurance education, multiple insurance carriers and products, exclusive professional development programs, and personalized sales support. You can also take advantage of the expanded services offered through our affiliated companies, Brokers International Financial Services, LLC and Brokers Life Marketing Group, LLC.

CalSurance Associates

420

www.naifaeo.com

CalSurance Associates, A Division of Brown & Brown Program Insurance Services, Inc. is a recognized leader in professional liability insurance sales, service and support. The CalSurance® organization provides insurance brokerage, group program management and administration, risk management, and loss prevention services. Founded in 1962, CalSurance® delivers 50 years of proven experience and results, developing custom insurance solutions that exceed client needs. This focused approach combined with the talents and experience of CalSurance® employees has been the foundation of consistent growth and long term success.

Centers for Medicare & Medicaid Services	220	www.cms.gov	The Centers for Medicare & Medicaid Services administers several critical programs: Medicare, Medicaid, the Children's Health Insurance Program, and more recently, the Health Insurance Marketplace. Please visit the CMS booth to learn more about these programs.
Chelsea Rhone Captive Services	524	www.chelsearhone.com	Chelsea Rhone specializes in the development and implementation of innovative insurance solutions for clients seeking alternatives to the conventional insurance marketplace. Our clients range from sophisticated health care organizations to multi-national construction and engineering companies.
College for Financial Planning	325	www.cffpinfo.com/mar.html	The College for Financial Planning (www.cffpinfo.com/mar.html) is the leading institution focused on meeting the education needs of financial services professionals. Founded in 1972, the College created the prestigious CERTIFIED FINANCIAL PLANNER™ (CFP®) certification, and is the exclusive provider of CRPC®, CRPS®, APMA®, ADPA®, AAMS®, and AWMA® education to the Insurance and Financial Services industry. The College has helped over 140,000 professionals develop their careers from providing securities licensing exam prep through graduating with a Masters degree. Our graduates are consistently ranked among the best financial advisers in the nation.
Columbus Life Insurance Company	412	www.columbuslife.com/becomeaproducer	Columbus Life is the premiere direct relationship company for exceptional Producing General Agents. We are a highly rated life insurance company offering products that are tailored to the affluent markets, with programs for capital transfer, business planning strategies, and retirement income management.
Copytalk, LLC	501	www.copytalk.com	Copytalk's Mobile Scribe service makes

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www.lifeagents.com

documenting all your important information faster and easier than ever before. Pick up your phone, dial Copytalk, and dictate the details of your meeting, your to do list, reminders, drafts of email, or any other information you want to capture. You can also take advantage of our mobile application for the same at-your-fingertips dictation on your smartphone or other mobile devices. Within a few hours, we deliver your transcribed text via email, secure download, or through automatic integration into many popular CRMs.

Creekmore Insurance Group, Inc. is a life insurance brokerage general agency specializing in impaired risk underwriting, complex, jumbo, and difficult to place life insurance cases. Our complete back room support and personalized service allows advisors to focus on their practice while retaining total independence. We are problem solvers. Advisors who do business with us get access to a world-class back office and leading-edge technology including our suite of mobile apps. Give us a shot at your next tough life case!

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www.LifeAgents.com

Creekmore Insurance Group, Inc. is a life insurance brokerage general agency specializing in impaired risk underwriting, complex, jumbo, and difficult to place life insurance cases. Our complete back room support and personalized service allows advisors to focus on their practice while retaining total independence. We are problem solvers. Advisors who do business with us get access to a world-class back office and leading-edge technology including our suite of mobile apps. Give us a shot at your next tough life case!

Creekmore Insurance Group, Inc. 319

www.lifeagents.com

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DIBroker	330	www.dibroker.com	DIBroker is the leading Individual DI/CI/LTCI brokerage agency.
Ed Slott and Company, LLC	401	www.irahelp.com	Ed Slott and Company, LLC is a recognized leader in the field of IRA-distribution planning, educating advisors and consumers on how to best take advantage of our complicated tax code. Ed Slott and Company offers a monthly newsletter and has developed Ed Slott's 2-Day workshop, IRA Leadership Program and Elite IRA Advisor Group specifically to help financial institutions and advisors become recognized leaders in the IRA marketplace. We host the popular websites, www.irahelp.com and www.theslottreport.com , and present educational seminars to financial advisor firms, mutual fund companies, brokerage firms, insurance professionals, financial planners, banks, CPAs, and attorneys across the country.
eFileCabinet	214	www.efilecabinet.com	eFileCabinet, Inc. offers a suite of document management software (DMS) products and services that help businesses and individuals work quicker, smarter and more collaboratively. With more than 12 years in the document management industry, eFileCabinet is the trusted choice for more than 70,000 users worldwide to store, share and protect their valuable and confidential data. Learn more at eFileCabinet, Inc. offers a suite of document management software

			<p><u>(DMS) products and services that help businesses and individuals work quicker, smarter and more collaboratively. With more than 12 years in the document management industry, eFileCabinet is the trusted choice for more than 70,000 users worldwide to store, share and protect their valuable and confidential data. Learn more at http://www.efilecabinet.com.</u></p>
Examination Management Services, Inc.	413	emsinet.com	<p>Examination Management Services, Inc. (EMSI) is the market leader in medical information services, helping clients make informed decisions and improve the lives of those they serve. Building on over 35 years of unwavering commitment, EMSI provides its insurance services customers with leading-edge medical record retrieval services, paramedical examinations, electronic application fulfillment services and more. For details, contact us at 800.530.0560, ext. 3337 or Examination Management Services, Inc. (EMSI) is the market leader in medical information services, helping clients make informed decisions and improve the lives of those they serve. Building on over 35 years of unwavering commitment, EMSI provides its insurance services customers with leading-edge medical record retrieval services, paramedical examinations, electronic application fulfillment services and more. For details, contact us at 800.530.0560, ext. 3337 or insurancesales@emsinet.com.</p>
ExamOne	200	www.examone.com	<p>ExamOne, a Quest Diagnostics Company, is dedicated to making the underwriting process quick and convenient for applicants, agents and home-office personnel. We know you want to focus on your client - not tracking down paperwork or following up on missing signatures. With ExamOne managing your application process, you can rest assured that your</p>

First Heartland Capital, Inc.	202	www.joinfhc.com	<p>applicants' experience is enjoyable and professional. And with our innovative scheduling system, convenient appointment options and laboratory integration, your policy delivery cycle will be faster than ever. Our dedicated team understands that behind every paramedical exam and laboratory result there is a person making an important decision.</p> <p>Make FHC® number one on your speed dial. Our goal is to provide you with the best relationship-based servicing BROKERAGE GENERAL AGENCY, BROKER DEALER, and REGISTERED INVESTMENT ADVISORY FIRM all in one. We view you as the sum of all parts - not just as a number. Stop by our booth and see what it's like to have family at home and at work. FHC® is completely independently owned and operated.</p>
Fonality, Inc.	532	www.fonality.com	<p>Fonality is the only provider of business phone systems and contact center solutions dedicated to the insurance industry. Stop by our booth to learn how Fonality can help your business improve productivity, increase collaboration, and save you money.</p>
Foresters Equity	206	www.forestersequity.com	<p>Foresters Equity is an insurance-friendly broker-dealer specializing in assisting agents and advisers who want to offer securities as a complement to their clients' portfolios. We support many independent financial professionals that greatly appreciate our attainable production requirements, affordable cost structure and agent-oriented atmosphere.</p>
FS Marketing Solutions	431	www.fsmarketingsolutions.com	<p>FS Marketing Solutions provides insurance agents and financial advisors a proven, turnkey and differentiated approach to developing highly successful Strategic Alliances with P&C Agencies and Tax</p>

Fujitsu Computer Products of America 327 <http://www.fcpa.fujitsu.com>

Professionals. Learn how to sell Life Insurance 24/7 through your agency website with our Consumer Life Insurance Quote Engine & Sales System and start capturing your share of the billion dollar online sales of life insurance each year. Come visit our booth and workshop to learn how our Strategic Alliance programs have resulted in hundreds of P&C agents and tax professionals nationwide provide a steady flow of insurance and other financial services leads to insurance agents and financial advisors just like you.

Fujitsu ScanSnap scanners take the complication out of document imaging with one-button ease of use. Perfect for home and small business environments, the ScanSnap family of scanners bring duplex multi-sheet scanning to everyone, combining performance and affordability in a compact size. Our ScanSnap scanner family also includes mobile document imaging solutions for professionals on the go. With the smaller size, Fujitsu has maintained high image quality output speed: Fujitsu ScanSnap scanners prove that small can be beautiful.

Futurity First Insurance Group 425 <http://www.ffig.com/>

Futurity First Insurance Group is a nationwide network of agents and advisors specializing in the financial security and retirement needs of seniors, pre-retirees, families, and businesses. Launched in January 2008, our mission is to provide our customers with the professional services of a community-based agent, a solution-based process to address their specific needs, and a choice of top-quality products from some of the leading insurance companies in the life and health insurance industry.

Gateway Insurance Solutions 218 www.gfalife.com

If you're interested in growing your life insurance and annuity business, then consider Gateway for your brokerage

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HP/InterCall/Lenovo 308

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HSA Bank 421

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needs. We do everything every other BGA or IMO does – excellent compensation, carrier and product access, advanced planned, impaired risk underwriting, etc. But where others stop, we're just beginning . . . Increase your life and annuity premium using our proven, turnkey marketing solution. Tired of filling out long applications? Utilize our Concierge Life service and we'll take of everything. How about free college scholarships? Offer those as an incentive for prospects to meet, and a special thanks to your clients. So partner with Gateway and take your business to the next level, while Making Life SimpleSM again.

Life Settlement Provider Comapny
NAIFA members can save with three Preferred Provider programs – technology products and solutions from HP and Lenovo, and conferencing and cloud services from InterCall and Microsoft Office 365. Enjoy special pricing on a wide range of HP business products, including printers, notebooks, PCs, servers, and much more. Or, save up to 20% of the everyday public web price of Lenovo products for the office and home, including the award-winning ThinkPad. You can also access Microsoft Office 365, through the InterCall member audio and web conferencing program, which delivers the power of cloud productivity to your business.

HSA Bank is a Milwaukee-based company and one of the nation's leading Health Savings Account (HSA) administrators. We serve more than 500,000 accountholders with more than \$1.9 million dollars in HSA assets. We focus solely on the administration, service and support of our HSA product. Our philosophy is to do what we do best and partner with others who do

Identity Branding, Inc/ e-Relationship	221	www.e-relationship.com	<p>the same to provide a best-of-breed solution.</p> <p>E-Relationship is the preferred email connection tool for financial advisors and managers. Subscribers use e-Relationship's unique automatic email system to effortlessly stay in front of clients and prospects by sending quarterly mini Checklists, e-Cards, Financial Briefs, Videos on topics like Estate Taxes and Deferred Compensation, Financial Newsletters and more! Advisors agree that e-Relationship's variety of content, worry-free compliance approved material, and automatic connections increase awareness, appointments and sales!</p>
Illinois Mutual	307	www.illinoismutual.com	<p>Illinois Mutual helps people achieve and safeguard their financial security by providing competitive life insurance, disability income insurance and workplace insurance solutions. For more than 100 years, we have focused on delivering the best personal service to our policyowners, agents and distribution partners with respect and integrity.</p>
infofree.com	530	www.infofree.com	<p>infofree.com™ is revolutionizing the sales lead and mailing list industry by providing unlimited search, select, and view of over 14 million business records, 220 million consumers, and hundreds of other specialty databases for the low, flat price of only \$49.95 per month or \$449 per year. Thousands of Insurance Agents and Financial Advisors are using infofree.com to reach prospects such as new homeowners, new movers, newlyweds, new businesses, and more!</p>
Innovative Brokerage Network	303	www.InnovativeBrokerage.Net	<p>Innovative Brokerage Network is a service-based and relationship-focused insurance marketing organization (IMO) whose guiding principles of integrity, honesty and</p>

hard-work, along with more than 25 years of diverse industry experience, have set out to be the IMO that advisors expect and deserve. Today's financial professionals require greater access to a diverse suite of insurance products designed to help their clients navigate the complexities that accompany financial success. Innovative Brokerage Network was created to work hand-in-hand with agents and advisors to create solutions centered on client suitability – when an advisor succeeds, we succeed.