

Strength Through Teamwork

Build Your Business by
Working With Associations



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Establish Yourself as a Trusted Resource

It's human nature – people prefer to do business with companies and individuals for whom they have an affinity. It's no different with association groups. Establish yourself as an association's go-to agent - it's an opportunity that can lead to a continual supply of quality prospects and referrals. That's strength through teamwork.



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Grow Your Business with Association Marketing

Whether the association you'd like to work with has 100, 200 or 1,000 members, getting involved in association marketing provides you instant credibility and access to potential customers that can help you grow your business.

Step 1 - Understand the Benefits

Association marketing is an efficient way to target groups of individuals with a common occupation or interest. You can offer members benefits or discounts not available to the general public and build your business through collateral sales opportunities and referrals to friends and family of association members.

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Step 2 - Identify an Association

What associations do you connect with? Focus on state and local groups in your natural markets – local groups are easier to establish a relationship with over national associations and provide you with higher potential marketing opportunities.

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Step 3 - Submit for Approval

Once you've identified an association, you'll need to do some paperwork: create and submit a marketing plan; complete a proposal request form and submit a copy of the organization's by-laws. If requirements are met, Mutual of Omaha will email you with final approval.

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Step 4 - Implement the Marketing Plan

You've laid the groundwork in your marketing plan. Now get to work performing the activities you've identified. Get involved by attending association meetings, events and conferences. That will help position you as the go-to expert to help association members with their insurance and financial services needs.

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Step 5 - Maintain Production

Nurture your relationships within the associations by meeting with association leadership regularly and see if there are any opportunities for additional support. Evaluate the marketing plan to see if any changes are needed. Ask if there are any upcoming events you can be involved with or additional ways to communicate with members.

For more information – including links to association forms and materials – look for the Association Marketing page in the Sales & Marketing section on Sales Professional Access (go to mutualofomaha.com/broker).

Note: Formal approval will be sent via email noting the Association Group number that must be used when completing the application.

Premium Discounts and Additional Benefits You Can Offer

Once you've established a relationship with an association, you're ready to offer a value-added service that will get the attention of association members – discounts and additional benefits they can't get anywhere else.

There are eligibility requirements an association must meet for you to offer discounts and additional benefits. Check to see if the association you're working with is available for these product discounts and additional benefits:

Additional Details for Approved Associations

- All associations are exclusive to the marketer and/or producer that submitted the association request for approval
- All applications are individually underwritten
- Due to employer benefit laws, employees of members are not eligible for coverage using the Association Marketing program
- To keep the group open and eligible for program benefits, you must issue the number of applications agreed upon in the marketing plan with agreed timeframe
- After the initial evaluation period, there must be 12 placed applications every 12 months to keep the group open
- A strong marketing plan is required

Association marketing can open the door to new sales opportunities. Contact your Mutual of Omaha sales team to help you get started.



Disability Income Insurance

15% premium discount (with 5% compensation offset) for approved associations.

Note: Discount amount may vary by state.

- This discount is available only to members of the association.
- An association must be an association with members in occupational risk class 2A and above.
- Additional requirements may be required, including financials.

Qualifying Group Examples

DO:

- Real Estate Associations
- Optometric Groups
- Bar Associations

DO NOT:

- Alumni Associations
- Police Associations
- Fraternal Organizations



Long-Term Care Insurance

Discount - 5% premium discount (with compensation offset) for approved associations on the MutualCareSM Solutions portfolio:

- This discount is available to members of the association and their spouse or partner.
- Associations whose membership is made up of hazardous occupation types are not eligible for the benefit. These occupations may include:
 - Aviation (including crop dusters)
 - Chemical industries or industries where exposure to chemicals, including pesticides and fertilizers is common
 - Marine (diving, salvage, towing, fishing)
 - Manufacturing (warehouse, packinghouse)

Qualifying Group Examples

DO:

- Closed Credit Unions
- Alumni Associations
- Chambers of Commerce

DO NOT:

- HMO or PPOs
- Church Organizations
- Philanthropic Organizations



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