BUSINESS GOALS & PARTNERSHIP PROFILE

Individual Producer Profile

About 3 minutes | Fill in on screen, save, and send

Thanks for your interest in AIM Group. A few quick questions so our first call is about your goals.

About You

Full name

Email

Phone

Agency / business name (if any)

State(s) licensed in

Years in the industry

Select one

Your Business

Lines of business you write

- ☐ Medicare Supplement
- ☐ Medicare Advantage
- ☐ Final Expense
- ☐ Life (Term / IUL)
- ☐ Annuities
- ☐ ACA / Health
- ☐ Ancillary (DVH, HIP)
- ☐ Other

Current annual production

Select one

12-month production goal

Select one

Carriers you're appointed with or want access to

Support You Want Most

Check all that apply

- ☐ Case design & underwriting
- ☐ Higher contract levels
- ☐ Leads & marketing
- ☐ Fast contracting
- ☐ Commission tracking
- ☐ Training & compliance

What would make the next 12 months a success for you?

Specialty Markets

Build a career that makes an impact

Our Specialty Markets provide opportunities. Check any you're interested in exploring:

- ☐ The Educator Market
- ☐ Retirement Planning
- ☐ Small Business Planning (CalSavers)
- ☐ Life Insurance
- ☐ Group Insurance
- ☐ Disability

Let's Connect

Preferred next step

- ○ Phone call
- ○ Video meeting
- ○ Email me info first

☐ AIM Group may contact me by phone, text, or email about partnership opportunities.

DONE? SAVE THIS PDF AND SEND IT TO:

Email: RM@workwithaim.com

Phone: (626) 714-1444

We'll reach out within one business day.