BUSINESS GOALS & PARTNERSHIP PROFILE

Agency & Firm Owner Profile

About 4 minutes | Fill in on screen, save, and send

Thanks for your interest in partnering with AIM Group. Tell us about your firm so our first call is about your goals.

About You

Full name

Title / role

Agency / firm name

Email

Phone

State(s) you operate in

Your Firm Today

Firm structure

Select one

Years in business

Select one

Annual agency production

Select one

Producing agents today

Select one

Agent goal in 12 months

Select one

Back-office / support staff

Select one

Sales model

- ○ Field / face-to-face
- ○ Telesales / virtual
- ○ Hybrid

Lines of business your agents write

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

Current upline / marketing organization and top carriers (optional)

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Agency & Firm Owner Profile

Operations, support, and growth plans

Where You Want Support

Check all that apply

- ☐ Contracting & onboarding
- ☐ Commission oversight & hierarchy
- ☐ Override & contract levels
- ☐ Agent training programs
- ☐ Recruiting support
- ☐ Leads & marketing
- ☐ Compliance & AEP readiness
- ☐ CRM / technology
- ☐ Production reporting

How do you contract and onboard new agents today? What slows it down?

Growth plans: new states, product lines, recruiting targets, or new offices

What would a successful partnership with AIM look like for your firm?

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

When are you looking to make a change or add support?

- ○ Ready now
- ○ Within 3 - 6 months
- ○ Just exploring

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.