

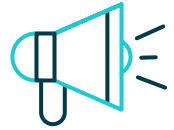


Agency Promotion Kit

Ready-to-use communications to help your producers recognize more life insurance opportunities among the customers they already serve.

Assurity®

Bring Assurity Moments to Your Producers



Your producers have opportunities to discuss life insurance every day, often with customers they already know. A conversation about retirement, a growing family or a business owner's responsibilities may reveal a need for protection.

Assurity Moments helps producers recognize those opportunities and connect them with life insurance solutions from Assurity. This kit gives your agency ready-to-use communications to introduce the campaign, keep the five Moments top of mind and encourage producers to put the resources to work.

What's included

- Launch email and follow-up email for your producer network
- Three newsletter articles with different editorial angles
- Eight social posts to publish over time
- A suggested promotion sequence
- Assurity contact information

How to use this kit

Start with the launch email. Select newsletter articles and social posts that fit your producer audience and communication calendar. Add your agency's sender details and approved resource links.

For a more in-depth introduction, use the Assurity Moments Producer Training Deck to introduce the campaign to your team. Encourage producers to explore the five Moments and corresponding Sales Idea Sheets at Assurity.com/Moments.

Important: The copy in this kit is intended for agency-to-producer communications, not consumer distribution. Have your team review any customization under your usual approval process.

Launch Email



Purpose: Introduce the campaign and invite producers to explore the five Moments.

Subject line options:

- The life insurance opportunities hiding in everyday conversations
- Introducing Assurity Moments: See the Moment. Think Assurity.
- Five customer moments worth a second look

Preview text:

A new way to recognize life insurance needs among the customers you already serve.

Hi [First Name],

A customer approaching retirement still has a mortgage. A business owner has people counting on them. A parent is raising a family while balancing everyday expenses. Each situation can open the door to a meaningful life insurance conversation.

That's the idea behind Assurity Moments, a campaign designed to help producers spot life insurance opportunities in familiar customer situations.

The campaign features five Moments:

- Securing the Family Business
- Retiring with a Mortgage
- Building a Life in America
- Empowering the Next Generation
- Protecting Everyday Lives

Explore the five Moments, review real-world sales scenarios and discover how Assurity can help you turn everyday conversations into life insurance opportunities.

[Explore Assurity Moments – [Assurity.com/Moments](https://assurity.com/Moments)]

Best,

[Name / Agency]

Follow-Up Email



Purpose: Re-engage producers with a practical recognition prompt, not a repeat of the launch.

Subject line options

- Who in your book is retiring with a mortgage?
- One familiar customer situation. One conversation worth having.

Preview text:

Start with a customer need, not a product pitch.

Hi [First Name],

Think about the customers you spoke with this week. Did anyone mention a retirement date, a growing family, a new business responsibility or a child's future?

Those milestones can change what people need to protect. Assurity Moments highlights five situations that can help you recognize when a life insurance conversation may be timely.

Start with the Moment that sounds most familiar to your customers. Each Sales Idea Sheet includes a customer scenario, a potential coverage solution and ideas to help you start the conversation.

[Explore the Sales Idea Sheets – [Assurity.com/Moments](https://assurity.com/Moments)]

Best,

[Name / Agency]

Newsletter Article 1: Campaign Introduction



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Headline:

The Life Insurance Conversation Often Starts Somewhere Else

Your customer mentions they're getting ready to retire, but they still have a mortgage. Another talks about expanding the family business. A grandmother wants to do something meaningful for her granddaughter's future.

None of these conversations started with life insurance. But each could lead to one.

That's the idea behind Assurity Moments, a new campaign highlighting five everyday situations where life insurance can make a meaningful difference.

From protecting a family business to helping a single parent provide for a child, each Moment illustrates a customer need and a potential life insurance solution from Assurity.

The next time a customer shares something about their family, business or future, consider whether there's a life insurance need behind the conversation.

See the Moment. Think Assurity.

[Explore the five Moments – [Assurity.com/Moments](https://assurity.com/Moments)]

Newsletter Article 2: Existing Customer Opportunity



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Headline:

Your Next Life Insurance Sale May Already Be in Your Book

When was the last time you looked at your existing customers for new life insurance opportunities?

Their lives don't stand still. They get married, have children, buy homes, start businesses and approach retirement. With each change comes a reason to reconsider whether their financial protection still fits their needs.

A customer who purchased coverage years ago may have a larger mortgage today. Someone who initially bought insurance to protect a spouse may now have children depending on their income. A business owner may have new financial obligations that weren't there when they first became your customer.

Assurity Moments highlights five customer situations that can help you recognize protection needs you might otherwise overlook.

Before looking for your next prospect, take another look at the customers you already serve.

See the Moment. Think Assurity.

[Explore the five Moments – [Assurity.com/Moments](https://www.assurity.com/Moments)]

Newsletter Article 3: Turning Recognition into Action



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Headline: **Five Moments. Five Ways to Start a Better Conversation.**

Recognizing a potential life insurance need is one thing. Knowing how to start the conversation is another.

Consider a customer approaching retirement who still has a mortgage. Rather than leading with a life insurance product, you might ask how they plan to manage that mortgage if one spouse is no longer there.

Or think about a business owner. What would happen to the business, its employees and the owner's family if something unexpected happened?

These are the kinds of conversations behind Assurity Moments.

Each of the five Sales Idea Sheets features a relatable customer scenario, a potential life insurance solution and ideas to help you start a conversation about protection.

Choose the Moment that best reflects the customers you serve. Review the scenario and consider who might benefit from a similar conversation.

See the Moment. Think Assurity.

[Explore the Sales Idea Sheets – [Assurity.com/Moments](https://assurity.com/Moments)]

Social Media Posts



For agency channels serving producers. Pair each post with its corresponding approved campaign visual, where available. Use the approved microsite or agency resource link in each CTA.

1 – Campaign Launch

Life insurance opportunities don't always announce themselves. They show up in conversations about family, retirement, business and the future. Assurity Moments highlights five familiar situations to help producers recognize when protection may deserve a closer look. See the Moment. Think Assurity. [Link – Assurity.com/Moments]



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2 — Securing the Family Business

A business owner may have a plan for the next quarter. But what is the plan if they are no longer there? Securing the Family Business is one of five Assurity Moments designed to help producers recognize life insurance needs behind everyday business conversations. Explore the Moment. [Link – [Assurity.com/Moments](https://assurity.com/moments)]



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3 — Retiring with a Mortgage

Retirement doesn't always mean the mortgage is gone. For customers nearing retirement with housing debt, life insurance may be worth discussing as part of their protection plans. Explore the Retiring with a Mortgage Moment and its producer sales example. [Link – Assurity.com/Moments]



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4 – Building a Life in America

Living and working in the U.S. without permanent residency? Life insurance options may be more limited, but Assurity is one of the few carriers offering a dedicated Middle Market Foreign Resident Program. Eligible clients who have lived primarily in the U.S. for more than one year may qualify for Term Life or Whole Life coverage, even without permanent resident status. Explore the Building a Life in America Moment and learn more about program eligibility. [Link – [Assurity.com/Moments](https://assurity.com/moments)]



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5 — Empowering the Next Generation

Grandparents often think about what they can give the next generation. Sometimes that conversation includes helping a child establish a foundation of lifelong protection. See how the Empowering the Next Generation Moment introduces a potential Children's Whole Life conversation. [Link – [Assurity.com/Moments](https://assurity.com/moments)]



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6 — Protecting Everyday Lives

Not every life insurance conversation begins with a major milestone. For a parent managing work, bills and children, protecting the people who depend on them can be reason enough to revisit coverage. Explore Protecting Everyday Lives. [Link – [Assurity.com/Moments](https://www.assurity.com/Moments)]



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7 — Middle Market

Life insurance isn't just for high-net-worth clients. A family with a mortgage. A small business owner. A single parent raising a child. These customers may not need complicated estate planning. They need protection that fits their lives and financial responsibilities. Assurity Moments highlights five ways to recognize life insurance opportunities across the middle market. See the Moment. Think Assurity. [Link – [Assurity.com/Moments](https://assurity.com/Moments)]



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8 – Producer Resources

Looking for new ways to start life insurance conversations? Assurity Moments includes five Sales Idea Sheets featuring relatable customer scenarios, potential coverage solutions and ideas to help you recognize opportunities among the customers you serve. Explore the Moments and find an idea you can put to work. [Explore the Sales Idea Sheets – Assurity.com/Moments]



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Suggested Promotion Plan



Use this suggested sequence as a starting point. Select the content and timing that work best for your agency's producer communications.

Week 1 – Introduce

Send the launch email and publish Social Post 1.

Week 2 – Make it relevant

Publish Newsletter Article 1 and a Moment-specific social post suited to your producer base.

Week 3 – Broaden the opportunity

Publish Newsletter Article 2 and two additional Moment posts.

Week 4 – Move to action

Send the follow-up email; publish Newsletter Article 3 and a resource-focused social post.

Ongoing – Rotate

Feature the remaining Moment posts individually, encourage producers to explore the Sales Idea Sheets and reinforce the campaign through agency-led training as appropriate.

Assurity National Accounts Contacts



If you have questions or need support, our team is here to help.

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How We Can Help

- Getting Started with Assurity Moments
- Support with training or rollout
- Help with contracting and next steps

Contracting questions

Contact our Sales Team at salesrequests@assurity.com or (800) 276-7619 Ext. 4264

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