

POLICY MANAGEMENT COMPANY

BRIDGING EXPECTATIONS WITH RESULTS



PMC IS EFFECTIVE

Allow us to help you:

- Focus on expanding your insurance business
- Leverage an outsourced team of professionals
- Enhance current client relationships

SUCCESS: One Valmark member stated, “I used to have a staff of four people that did nothing but monitor our book of business. The PMC brings a different level of expertise... I get better service. I get a better report and I get to send that report to the advisors, clients and trustees. It’s seamless.”



PMC IS SUPPORTIVE

Allow us to simplify by:

- Facilitate in force service requests
- Send premium notices and reminders
- Provide growth and new revenue opportunities

SUCCESS: A client mailed a \$10,000 check to the insurance company a month before the due date. Upon the PMC verifying the premium payment, it was discovered that no payment had been applied to the policy, despite the check being cashed. The PMC coordinated with the carrier to locate the lost payment, expedite the processing time and ensure it was applied appropriately.



PMC IS THOROUGH

Allow us to be experts:

- Utilize carrier relationships to dig deeper into policy situations
- Consider the financial strength of carriers
- Uncover and correct errors by the insurance company

SUCCESS: In a recent situation, a signed application showed a policy with an increasing death benefit, however the signed illustration showed it as level death benefit. The PMC caught this error, which included higher costs of insurance and lower guaranteed coverage. The PMC worked with the carrier to resolve this error, so that the policy would perform as intended.

Valmark Policy Management Company offers a turnkey management and monitoring solution to help Valmark Member Offices and their allied professionals deliver on client expectations. Active and ongoing policy maintenance enables you to provide clients the assurance that their policy will perform as designed and continue to meet their needs.

For more information on the Policy Management Company, please contact pmc@valmarkfg.com or valmarkpmc.com



Securities offered through Valmark Securities, Inc. Member FINRA, SIPC | Advisory Services offered through Valmark Advisers, Inc. A SEC registered investment advisor | 130 Springside Drive, Akron, OH 44333 800.765.5201