

Starting the Business Life Insurance conversation is easy...

Does your company have a formal succession plan in place?

This will generate a simple “yes” or “no” answer.

If No:

You are not alone, approx. 3 out of 4 small business owners do not have a formal succession plan in place. Part of my services is to help you and your business put a plan in place. When is a good day and time we can follow-up on this and discuss solutions to help secure your business?

If Yes:

When was the last time you reviewed your buy-sell agreement and partnership agreement?

Set a follow-up meeting, leave your clients the one-page business life insurance flyer. Contact Steve Clemens to review and for the marketing tools, intake sheets and fact-finding information for your follow-up meeting.



Steve Clemens
Life Markets Vice President
717-216-8051
stevec@urlinsgroup.com