

# Security Mutual's Infinite Banking Training Incentive Program

Security Mutual is committed to encouraging training for our agents who use Nelson Nash's Infinite Banking Concept. We recognize that the more knowledge and experience you gain from the system, the more success you will have.

For Security Mutual Agents in good standing, we will reimburse you for a portion of your Infinite Banking training expenses based on the following criteria and with documented proof of completion: For every \$15,000 of paid permanent ordinary annualized life premium, we will contribute \$250\* in "Training Dollars" toward any of the options listed below:

1. IBC Think Tank Symposiums – These programs, held twice a year, provide members with new marketing initiatives, new web site/blog initiatives and new products. Additionally, you are given the opportunity to share your successes with the group and to make recommendations on how to improve the IBC product line and marketing initiatives.
2. Alpha & Omega Financial Services Private Family Banking Solutions Agent Training Level I, II & III – These classes are designed to train agents how to successfully design and support Private Family Banking solutions.

For more information on Infinite Banking, go to [www.infinitebanking.org](http://www.infinitebanking.org)



Becoming Your Own  
**BANKER**<sup>TM</sup>

For more information, contact Jim Conlon, 800-346-7171, extension 7213, or [jconlon@smlny.com](mailto:jconlon@smlny.com).

If you want information on how to become contracted with Security Mutual, contact Jim Conlon or Greg Simonelli at 800-293-6292 or [gsimonel@smlny.com](mailto:gsimonel@smlny.com).

\*Subject to \$250 contribution per quarter, with a maximum annual cap of \$1,000.

# The Many Reasons to do Business with Security Mutual.

## PRODUCTS

Traditional • Whole Life, Universal Life, LP85, Survivorship Life

## UNDERWRITING

- 5 Underwriting Classes
- Competitive Nonmedical, Medical and Inspection Limits
- Preferred & Preferred Plus Rates Available to “Occasional” Cigar Smokers
- Table Reduction Program
- Underwriters Trained on *MoneyTrax* and the Infinite Banking Concept

## MARKETING

- Estate Planning
- Business Planning
- Deferred Compensation
- Retirement Planning

## COMPENSATION / CONTRACTING

- Competitive Compensation Package for General Agents and Soliciting Agents
- 3 Different Soliciting Agent Contracts Available
- Annualization of Commission (Career Agents)
- Qualified Retirement Plan with a 401(k) Feature (Career Agents)
- Matching FICA (Career Agents)

## SERVICES

- Advanced Marketing Support and Design
- Advanced Marketing/Tax Attorneys on Staff
- CE Credit and Advanced Sales Meetings
- Bimonthly Newsletter
- Products, Services and Advanced Marketing Webcasts
- Accessible, Service-Oriented and Friendly Staff

## RATINGS

A.M. Best • A- (Excellent)

A.M. Best Rating is current as of the publication date. Ratings reflect a rating agency's opinion of a company's financial strength and ability to meet its obligations to policyholders. A rating is not a recommendation of a company or any specific policy form. A.M. Best's "A-" rating is the fourth highest on a 15-step rating scale. Rating is subject to change.

For more information visit [www.smlny.com](http://www.smlny.com) • [www.smlnyagent.com](http://www.smlnyagent.com)

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