Introducing...
An even EASIER SOLUTION for YOU

DBS App Vantage

We're now offering a special perk: application fulfillment. That's right, our AppVantage team completes the application for YOU!

1 Case Consultation with CDA

Your Case Design Analyst completes the initial data collection form and initiates the process.

2 Data Collection by Advisor

Advisor meets with client as necessary to compile required personal and financial information.

LINK

3 AppVantage Team Completes the App!

Your team at DBS proceeds with the application and completes all necessary steps in the process.

YOUR ROLE

It is required by law that the advisor collecting information protected under the Health Insurance Portability and Accountability Act (HIPAA) and/or information considered Personal Identifiable Information must be licensed in the state of sale.

- Simply complete our electronic form with information from the client so that the AppVantage team can complete the application!
- Communicate with your client (and owner if applicable) that they can expect to provide additional authorization and attestations.

WHAT CASES QUALIFY?

- Cases must have a Target Premium of $10k or higher
- Permanent Cases only; use DBS FASTerm for your term needs
- Any case with riders will be accepted; no Asset-Based Life/LTC (i.e. Lincoln MoneyGuard)
- No Minors
- No Business Insurance or Premium Finance

For the Education of Financial Professionals Only. Not for the General Public.

DBS

Diversified Brokerage Services, Inc.
www.dbs-lifemark.com

Get in Touch:

Contact your dedicated Case Design Analyst