BB&T Life Insurance Services

Integrated Insurance Solutions For Your Clients

The insurance professionals with BB&T Life Insurance Services are here to help you strengthen the relationships you have with your clients to help manage their financial risks and fulfill their financial planning needs. We'll proactively work with you to provide an integrated approach to consulting with your clients and a seamless delivery of life, long term care and disability insurance products and solutions.

- **Integrated Team.** Our experienced life insurance professionals will be a part of your team and work proactively with you and your clients. And, as a continuation of the existing referral process through the Insurance Referral Operations Center, we're staffed to handle all of your clients' related life insurance needs.
- **Client Discovery.** An important offering provided by our team is the ability to help you identify opportunities in your book. We'll also provide you with education and training on key concepts from simple risk management needs to more complex business and estate planning.
- **Dedicated Resources.** We can work directly with you and your client in person or by phone. The clients' needs will dictate whether an insurance solution is provided as well as determine the appropriate insurance professional to assist them.
- **Consultative Approach.** Our team will help you identify the need, design an integrated solution and clearly communicate options to the client. We'll also partner with you to help you understand the concepts used to assist with wealth transfer, business planning and tax issues.
- **Comprehensive Support Team.** Along with our case designers and application team, our pre-sale support inCLU®des an Advanced Markets Team that consists of hand-picked attorneys, CPAs, CLU®s, ChFC®s, and CFP®s– skilled in using insurance for wealth transfer and wealth accumulation. As cases are processed, they are handled by our dedicated case managers and underwriters.
- **The Power of Crump.** Our team is backed by the power of the leading distributor of life and related products in the United States. Annually, Crump Life Insurance Services helps their agents secure nearly $100 billion of insurance coverage for their clients. Crump has established strong relationships with the industry's top carriers to bring to market a product suite with the depth and breadth necessary to meet almost any client need.

BB&T Life Insurance Services

Triad

Your BB&T Life Insurance Services Team

We are pleased to introduce the insurance planning team at BB&T Life Insurance Services for your region. Our team brings decades of experience to assist you with your insurance needs and provide life, long term care and disability insurance products and solutions.

Team Member	Key Focuses	Skill Sets & Knowledge
External Sales  James Reaves, CFP®, AEP *Regional Insurance Strategist* 336-733-3356 JKReaves@BBandT.com	▪ Provide point-of-sale for complex cases ▪ Participate in client discovery meetings as an integrated member of the solutions team	▪ Serve as an educational resource about issues where life insurance is an appropriate solution ▪ Review financial plans and work on insurance solutions ideas where appropriate
Internal Sales  Mike Rice *Insurance Strategist* 980-209-8575 Michael.Rice@BBandTLife.com	▪ Participate in client discovery conversations by phone to identify potential insurance opportunities and offer appropriate product solutions across multiple channels	▪ Ability to identify specific client needs, both individual and business, that provide value to the client and generate interest in further discussion ▪ Help client implement life, long term care and disability insurance solutions in the planning process
 Davis Vickers *Insurance Analyst* 704-417-5972 Davis.Vickers@BBandTLife.com	▪ Facilitate transactional business at the direction of the Insurance Strategist ▪ Coordinate communication between the IRM partner, client and the Strategist	▪ Ability to make recommendations for traditional individual client needs ▪ Help the client implement life, long term care and disability solutions to meet the client's need at the direction of the Insurance Strategist
Business Development Specialist  Mike Kessler *Business Development Specialist* 704-996-2499 Mike.Kessler@BBandTLife.com	▪ Assist with identifying and approaching clients as well as connecting clients with the right resources throughout all channels	▪ Serve as an educational resource about issues where life insurance is an appropriate solution ▪ Review financial plans and work on insurance solutions ideas where appropriate

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