



Contact us! Your Crump team is ready to provide seamless delivery of life, long term care/linked benefits, and disability insurance solutions to help meet your Schwab clients' individual goals and objectives.

See reverse side for more information and additional Crump resources supporting Schwab.

Submitting an Insurance Referral

Use Jumpword **Insurance** or [Click Here](#)

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Role Definitions

Business Development Specialist (BDS): Focused on increasing the insurance engagement of financial consultants (FC) within their assigned division. BDSs provide training and education to the field while partnering with field management in developing and measuring team competency in insurance solutions. Training can be provided at the division, market, office, and/or individual FC level. Questions on who to engage for a particular client need can be directed to your BDS, who will connect you with the most appropriate sales resources.

Insurance Strategist (IS): Dedicated to providing life, long term care, and disability insurance solutions for Schwab clients primarily through a virtual delivery model. ISs are assigned to Branches/Regions and work with mass affluent, high-net-worth, and ultra-high-net-worth clients. Expertise includes estate planning, legacy planning, business and personal insurance planning.

Insurance Analyst (IA): Responsible for assigning and scheduling new insurance referrals. IAs are insurance licensed, meet with clients, answer general insurance inquires, and take applications.

Case Manager: Responsible for managing the insurance application and working closely with the client, Schwab Representative, IS, and insurance company to convert a submitted application to a placed policy.