

Meet your insurance planning team

Supporting TIAA advisors

We are pleased to introduce your Crump insurance planning team. This team will provide an integrated approach when consulting with your clients in order to provide a seamless delivery of life insurance and long term care/linked benefit solutions.



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Primary Contact

The **Business Development Specialist** (BDS) is an internal role dedicated to providing advisors with education and marketing support to identify opportunities where insurance may fit into their practice. They are responsible for articulating the referral process and directing the advisors to the insurance strategist for design and implementation.

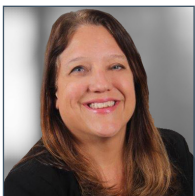
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The **Insurance Strategists** (ISs) are highly skilled insurance professionals who partner with advisors to provide point-of-sale expertise on various solutions to design and implement insurance planning strategies. Your IS generally works with mass affluent and high-net-worth individuals and emerging wealth families. Working in collaboration with the BDS, they are responsible for supporting the discovery process.

Support Roles:

The **Insurance Analyst** (IA) is responsible for assigning and scheduling new insurance referrals. IAs are insurance licensed, meet with clients, answer general insurance inquiries, and take applications.

The **Case Management team** is responsible for managing the insurance application and working closely with the client, TIAA advisor, IS, and insurance company to convert a submitted application to a placed policy.

Leadership:

Reggie Phillips

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