



# DIFFERENCE MAKER

## ONBOARDING GUIDE

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IMPACT LEGACY GROUP

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The Impact opportunity allows you to create a million dollar business using our million dollar business building model. This allows you to empower other people to experience the same building opportunity and financial freedom that you are participating in.



[www.impactlegacygroup.com](http://www.impactlegacygroup.com)



WELCOME

# YOUR JOURNEY TO BE A **DIFFERENCE MAKER** STARTS NOW

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## MAKE AN **IMPACT.** BUILD YOUR **LEGACY.**

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Impact Legacy Group is unlocking the full potential of the insurance industry, making six-figure incomes and beyond achievable. Our exclusive platform provides agents the confidence to launch a successful career. When you join us, you're part of a nationwide family working together to make a positive difference in the lives of clients, families, and communities.





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# WELCOME TO IMPACT LEGACY GROUP

**There are corporations, and then there is Impact Legacy Group.**

You joined Impact because you embody a rare breed, a person who is willing to bet on their own potential. You crash through the restrictive ceilings of corporate America, invigorated by the realm of possibilities. Identifying as a difference-maker you recognize the potential in changing lives through meaningful products, services, and opportunities. This is not just a job. This is the kind of work that you can be proud to tell your family about. Joining us was a step to challenge yourself, aiming to create a life marked by significance and financial freedom. This work matters, and you will not find it anywhere else. We are excited about your future here and are proud to have you as one of the Impact Legacy Group's newest members!

Sincerely,

**Brian Askins**  
Chief Executive Officer



**Roger Short**  
Chief Visionary Officer





# ONBOARDING GUIDE

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WHO  
WE  
ARE

01



# WHO WE ARE

We know it is essential for you to know who you are working with and what to expect from them. ***To put it simply, we are difference makers. Our heartbeat has always been caring for and connecting with the people that we serve. We empower them to change their lives and the lives of those in their circle of influence.***

We believe the best way to accomplish this change is by building trusting relationships, casting vision, and moving quickly to help people achieve their goals and become profitable. We are experts at creating six-figure sales careers and seven-figure businesses in the life and health insurance industries. We are difference makers.

Most people feel like they don't make enough money or are stuck in a job or career they don't love. ***At Impact Legacy Group, we offer a six-figure sales career and a million-dollar business opportunity in the insurance and financial services market, so you can take back control of your life and gain the financial freedom to enjoy it.***

It is our job to help you launch your career, increase your sales, grow your business, and build your legacy by plugging you into a winning community and providing you with the tools and resources you need to win. Our goal is to meet you where you are, expand your vision, and help you get where you want to go.





# OUR BELIEFS



We believe we should give our lives to something bigger than ourselves. We believe we are blessed beyond measure and those blessings come with a responsibility to make the world a better place for everyone.

01

That's why we are proud to announce we will be establishing a foundation that is designed to meet the most basic needs of people, offer mentoring opportunities to young people, and investments in entrepreneurial opportunities for the next generation.

## CAUSE

We believe anything is possible if you have the right vision and the right people. The best agents in the country make up our community. This is important to us because we know who you associate with will ultimately determine your future. Your future is at stake, so to us, it is important to work with character driven people who have a vision to build something special and leave a legacy.

02

## COMMUNITY

We believe companies rise and fall with their culture, and their success is based on the execution of their beliefs and systems. At Impact Legacy Group, we believe we have built our companies on the principle that character matters and our reputations speak for themselves. We have been able to create this environment and foster these relationships because we are a principled group of entrepreneurs that are guided by our core values.

03

## CULTURE

We believe in unlocking the full potential of the insurance industry, making six-figure incomes and beyond achievable. Our growth models are designed for hungry entrepreneurs who have a vision for scaling large distribution models.

04

## COMPENSATION



# OUR VALUES

## Voices Matter, Transparency, Integrity, Trusting Positive Intentions

We believe that everything is built on trust. Relationships and reputations depend on it. We embrace this trust and are committed to always do the right thing and deliver on our promise of providing quality products that serve our clients, agents, and agencies.



## TRUST

## Innovation, Commitment, Creativity, Inspiration

We believe that it is our job as industry leaders to point people in the direction of growth and opportunity. We believe in the potential of people and will always inspire our team to embrace challenges and be the best version of ourselves at all times.



## VISION

## Efficiency, Critical Thinking, Responsiveness

We believe that it takes rapid action to capitalize on opportunities. We move quickly and decisively to meet the needs of agents and agencies in order to move them to profitability.



## SPEED

## Collaboration, Precision, Solution-Focused, Quality

We are committed to the highest standards in all we do. Excellence is our guiding principle, driving us to exceed expectations and deliver exceptional value. It shapes our products, services, and processes, ensuring our position as industry leaders. This commitment to excellence inspires our team to achieve greatness, fostering a legacy of success and impact.



## EXCELLENCE

## Mutual Profitability, Reward Hard Work, Look Beyond Ourselves

We believe our conversations, goals, and systems are designed to make an impact on the lives of our agents and agencies. The number one way that we impact the world is to be a profitable company that offers opportunity and empowers others to be profitable.

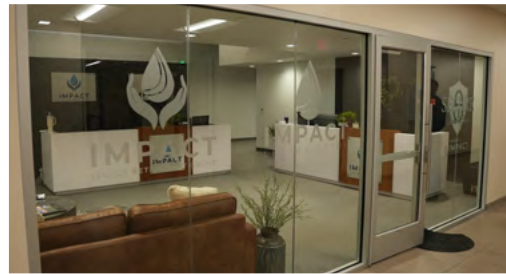


## LEGACY





# OUR HOME OFFICES



A lot happens behind the scenes to support our national team of agents. This work is carried out from our two home offices: one in Springfield, MO, and the other in Louisville, KY. Our team is dedicated to supporting the growth, leadership, and management of your business. Daily, we assist agents through client support, carrier communication, resource development, training, contracting, coaching, and recruiting. This space is designed for you. Numerous agents introduce potential recruits to our office to meet the team and better understand the Impact Legacy Group culture. Additionally, some agents rent office space to benefit from a collaborative environment and offer a professional experience to their clients and team.

## SPRINGFIELD OFFICE:

3253 E. Chestnut Expy  
Suite 320 Box 10  
Springfield, Mo. 65802  
Office No.: (417) 883-9300  
Fax No.: (417) 883-9311

## LOUISVILLE OFFICE:

2020 High Wickham Place  
Suite 101  
Louisville, Ky 40245  
Office No.: (502) 915-8218  
Fax No.: (502) 915-8219




# EXECUTIVE TEAM



## BRIAN ASKINS

MANAGING MEMBER  
CHIEF EXECUTIVE OFFICER


Brian.Askins@impactlegacygroup.com  
(417) 881 -0080 ext: 200  slack

- Strategic Partner Relations and Events
- Team Recruiting & Onboarding
- Sharing the Impact Story



## ROGER SHORT

MANAGING MEMBER  
CHIEF VISIONARY OFFICER


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- Strategic Partner Relations and Events
- Team Recruiting & Onboarding
- Sharing the Impact Story



## CHRIS BALL

MANAGING MEMBER  
VP OF LEADERSHIP DEVELOPMENT


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- Life Structuring / Onboarding
- Life Expert Review - Contracting Direction
- Life Sales Training & Support
- Communications
- Leadership Development



## ZACHARY MCELWAIN

MANAGING MEMBER  
VP OF BUSINESS DEVELOPMENT & AGENT RELATIONS


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- Agent Services Support
- Life Insurance Academy
- Impact Leads
- Carrier Relations
- Carrier onboarding / Processes
- Group Onboarding
- Innovation and Development
- Strategic Relations / Problem solving



## THOMAS GRAZIANO

MANAGING MEMBER  
VP OF STRATEGIC DEVELOPMENT & AGENCY GROWTH

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(417) 881 -0080 ext: 2905  slack

- Carrier Relations
- Carrier Onboarding / Processes
- Group Onboarding
- Innovation and Development
- Strategic Relations / Problem solving
- Software and Technology




# EXECUTIVE TEAM



## TY JAMES

MANAGING MEMBER  
VP OF MEDICARE - HEALTH


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- Medicare Structuring / Onboarding
- Medicare Expert Review - Contracting Direction
- Medicare Sales Training & Support
- Medicare Leads
- Medicare Growth & Development



## MATT SMITH

MANAGING MEMBER  
VP OF AGENCY OPERATIONS


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- Impact Events
- Advance Markets Carrier Relations
- Advance Markets Training & Support
- Advance Markets Growth & Development



## DALLAS KEITHLEY

MANAGING MEMBER  
VP OF AGENCY DEVELOPMENT


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(417) 881 -0080 ext: 219  **slack**

- Strategic Partner Relations and Events
- Recruiting & Onboarding
- Sharing the Impact Story
- Impact LIVE events
- Medicare Seminars



## PAT SCHMIDT

MANAGING MEMBER (ILRG)  
VP OF BUSINESS DEVELOPMENT

Pat.Schmidt@impactlegacygroup.com  
(417) 881 -0080 ext: 8888  **slack**

- Advance Markets Carrier Relations
- Advance Markets Training & Support
- Advance Markets Growth & Development

# EXECUTIVE TEAM



# WHAT WE DO

We offer training and mentorship in the sales of **Life Insurance, Medicare, Health and Retirement products** in the thriving insurance and financial services market.

## **We come alongside you and help you discover your opportunity.**

By operating across several verticals, we generate cross-sales opportunities that enable lasting passive income, while dedicating resources to train and empower agents in selling and growing their teams.

## **We come alongside you and help you build your business.**

We are dedicated to partnering with you in discovering talent, enriching agents' sales capabilities, and empowering them to construct profitable teams.

## **We come alongside you and help you grow your legacy.**

Join a movement that empowers you to create passive income and create lasting change.



*Impact Legacy Group has helped thousands of agents discover a simple and empowering business model that allows them to live meaningful lives and finally feel like they are winning.*





# MARKETS WE SERVE



GENERAL LIFE • FINAL EXPENSE • MORTGAGE PROTECTION

## LIFE

Life insurance provides financial protection to individuals and their loved ones by offering a payout in the event of the policyholder's death.

Traditional Life Insurance may be suitable for those seeking higher coverage limits and willing to undergo a detailed underwriting process. On the other hand, Simplified Issue Life Insurance provides a faster and more accessible option, particularly for individuals with health considerations.

Here at Impact, we are committed to supporting our agents in navigating both Traditional and Simplified Life Insurance markets and ensuring their success in serving clients seeking straightforward coverage.

We offer our agents extensive training and educational resources to deepen their understanding of life insurance products, effective selling techniques, customer relationship management, and client retention strategies. We Provide a principled sales system that is simple, empowering and profitable to help our agents in order to be difference makers in the lives of their families, clients and in their community.



# MARKETS WE SERVE



**ANNUITIES • LIFE INSURANCE WITH LONG-TERM CARE BENEFITS  
TAX-FREE RETIREMENT • WEALTH MANAGEMENT  
BANK ON YOURSELF • DEBT FREE LIFE • MORTGAGE FREE LIFE**

## ***ADVANCE MARKETS***

Advanced Markets offers a diverse range of financial and retirement solutions meticulously crafted to assist individuals in planning and securing their financial future. This protection is typically achieved through various means such as Annuities, Life & Long-Term Care Strategies but our Impact Legacy Retirement Group also has a wealth management division that can comprehensively support all the needs of each client. Additionally, the Advanced Markets team offers strategic approaches like Tax Free Retirement, Bank on Yourself, Mortgage Free Life, and Debt Free Life. Our dedicated and comprehensive approach is committed to delivering the best financial products that removes the anxiety and uncertainty about your clients retirement years so that they can live the life and leave the legacy they always wanted.

Our unwavering commitment extends to supporting our agents and strategic partners in these advanced markets, providing guidance on effective selling techniques, customer relationship management, and client retention strategies specific to this dynamic landscape. Impact Legacy Retirement Group empowers our agents to achieve financial freedom through assisting clients in protecting their families future.





# MARKETS WE SERVE



**MEDICARE ADVANTAGE • MEDICARE SUPPLEMENT  
PRESCRIPTION DRUG PLAN**

## **MEDICARE**

Medicare is a federal health insurance program in the United States designed primarily for individuals aged 65 and older, as well as certain younger individuals with disabilities. It consists of different parts, including Part A (hospital insurance), Part B (medical insurance), Part C (Medicare Advantage), and Part D (prescription drug coverage). Our agency is dedicated to supporting our agents in navigating the complex Medicare market and ensuring their success in assisting beneficiaries.

At Impact, we recognize the importance of Medicare as a critical component of the U.S. healthcare system. We provide extensive training and educational resources to our agents, ensuring they have a comprehensive understanding of Medicare regulations, plan options, and the enrollment process. This knowledge equips our agents to guide beneficiaries effectively in

choosing the most suitable Medicare coverage for their needs.

We offer guidance on effective selling techniques, customer relationship management, and client retention strategies specific to the Medicare market. By providing comprehensive support, our agency empowers agents to succeed in helping beneficiaries make informed decisions about their Medicare coverage.



# MARKETS WE SERVE



## HEALTH

### AFFORDABLE CARE ACT

The Affordable Care Act (ACA) is a comprehensive U.S. healthcare reform law aimed at improving accessibility, affordability, and quality of health insurance. It includes provisions such as expanded Medicaid, Health Insurance Marketplaces, essential health benefits, and protections for pre-existing conditions.

Here at Impact, we offer guidance on effective selling techniques, customer relationship management, and client retention strategies. By providing comprehensive support, our agency empowers agents to succeed in the dynamic ACA market, assisting individuals and families in making informed decisions about their health insurance coverage.

## ANCILLARY

**DENTAL • VISION  
DISABILITY • ACCIDENT  
CRITICAL ILLNESS  
CANCER  
LONG TERM CARE  
HOSPITAL INDEMNITY**

Ancillary products in the insurance industry encompass a variety of supplementary coverage options that go beyond the scope of basic health insurance. These products, including dental, vision, life, disability, accident, critical illness, long-term care, hospital indemnity, and cancer insurance, provide individuals with additional financial protection for various healthcare-related expenses.

Here at Impact, we are dedicated to assisting agents in successfully navigating the ancillary insurance market. Through education, technology, marketing support, compliance assistance, networking, and sales support, we empower our agents to provide clients with the additional financial protection they need for a comprehensive and well-rounded insurance portfolio.





# ONBOARDING GUIDE

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## THE IMPACT COMMUNITY

02



# IMPACT WEBSITES



Impact Link, which can be found on the Impact Legacy Group website is specifically designed to provide you with tools, resources, and training materials crucial for your profitability. Once you log in using the email address you provided during on-boarding you will have access to your own agent portal, you'll find several essential features you should familiarize yourself with: Agent Dashboard, Training, Supplies, Reference Tools, agent on-boarding resources and much more. The agent dashboard is filled with quick links, downloadable forms, updates, training videos and resources for daily use.

- **Discover Your Opportunity**
- **Build Your Business**
- **Grow Your Legacy**



**IMPACT LEGACY GROUP**  
Official Website

<https://impactlegacygroup.com/>

**IMPACT LEGACY  
RETIREMENT GROUP**  
Website

<https://impactingyourlegacy.com/>



# SOCIAL MEDIA



Our social media presence is designed as a tool to enhance your profitability through team growth. Our social posts are crafted to convey our culture, energy, and commitment to growth. Although seldom expressed aloud, people yearn to do work they love. We encourage you to leverage your social media platforms as a megaphone, broadcasting to the world that you've discovered the opportunity everyone seeks. When people see the posts you share, they will be inspired to reach out and inquire about opportunities. Social media serves as an exceptionally effective channel for spreading the word about your team's growth.



**IMPACT LEGACY GROUP**  
**FACEBOOK PAGE**

[youaremadeforimpact](https://www.facebook.com/youaremadeforimpact)



**IMPACT LEGACY GROUP**  
**FACEBOOK AGENTS GROUP PAGE**

[groups/495978997731800](https://www.facebook.com/groups/495978997731800)



**IMPACT LEGACY GROUP**  
**INSTAGRAM**

[@impactlegacygroup](https://www.instagram.com/impactlegacygroup)



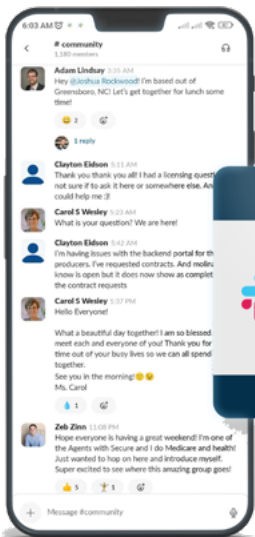
**IMPACT LEGACY GROUP**  
**LINKEDIN**

[company/impactlegacygroup](https://www.linkedin.com/company/impactlegacygroup)





# SLACK



JOIN US

**Slack** is an exclusive social network for our team. This platform helps you become profitable by allowing you to learn, collaborate, celebrate, and find help in a community of like-minded people that you can trust. We believe that people win in a community and lose in isolation. Inside of the **Impact Legacy Group Slack community**, agents can find daily underwriting help, support, encouragement, and competition.

You will have complete access to the Impact Legacy Group Slack community once your contracts have been processed and you have been appointed with carriers. This tool is broken up into channels and direct messages. Each channel has a dedicated topic where related information is shared. For example, agents will post sales in **#production**. They can ask for help with a client situation or underwriting in one of the help channels, and share company updates and news in **#announcements**. You will be added automatically to the following channels for easy access to information, help, and resources on-the-go:



**#announcements** - Stay Up-to-Date with all Important Information, Promotions, Incentives and Announcements. Turned Notifications ON for the Announcements Channel.

**#builders-group** - It's time to grow. This is where we focus on recruiting resources & the hiring processes and procedures associated with expanding your teams.

**#community** - Embrace the culture of Impact. Our community shares pictures of our families, inspirational quotes, exciting news and life events. Make new connections and help each other win!

**#help\_annuities-retirement** - Use this channel to get near-immediate help and support from the team on Annuities & IULs.

**#help\_life-final-expense-mortgage-protection** - Use this channel to get near-immediate help and support on all simplified issue life cases primarily in the final expense and mortgage protection markets, but may also include children's simplified issue whole life.

**#help\_life-traditional-long-term-care** - Use this channel to get near-immediate help and support on fully underwritten products and Long Term Care policies. These will include Tax-free Retirement, Bank-On-Yourself, and Mortgage Free Life concepts.

**#help\_medicare** - Use this channel to get near-immediate help and support from the team on Medicare & Supplemental Plans.

**#help\_under65health** - Use this channel to get near-immediate help and support from the team on Under 65 Health ACA.

**#help\_impact-link** - Use this channel for all questions and assistance for Impactlink. Leaderboard, Training Center, My Team, Leads, and much more...

**#help\_impact-link-plus** - Use this channel for all questions and assistance for ImpactLink Plus. CRM, automations, Lead integration, Power dialer and much more...

**#help\_agent-services-team** - Connecting you to Impact. This team will be able to assist with any questions you have. Our team is dedicated to making a difference in your life and business.

**#production** - Share with the team, the production you have written to encourage and motivate others as well as celebrate your success.

## JOIN THE IMPACT SLACK COMMUNITY



<https://impactlegacygroup.com/slack>





# ONBOARDING GUIDE

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Impact Legacy Group offers live and virtual connection times designed to help you become profitable by allowing you to learn, collaborate, and celebrate in a community of like-minded people that you can trust. We are big believers in community and winning together. For our agents to feel connected, we have connection times built into our weekly schedules.

# CONNECTION TIMES

# 03



# CONNECTION TIMES

ISN'T IT **TIME** FOR YOU TO  
FINALLY BET ON **YOURSELF?**

## MONDAY MORNING LAUNCH CALL

We are made for Impact! Each week we come together to inspire, motivate and celebrate our community. Get your week started with focus, energy and enthusiasm.

<https://Impactlegacygroup.com/Launch>

**Monday Morning**  
**9:30 AM EST /**  
**8:30 AM CST**

## MEET THE PARTNERS

To support your recruitment and onboarding efforts, our principal managing partners, Brian Askins and Roger Short, are offering an opportunity for you to introduce your prospective new agents to the Impact Legacy Group community. We are eager to meet your potential new partners and are enthusiastic about supporting your team's growth by sharing the Impact Legacy Group story and helping them see their place in it! Share the link below for our weekly meetings:

<https://Impactlegacygroup.com/mtp>

**Thursday Evening**  
**6:30 PM EST /**  
**5:30 PM CST**





## ONBOARDING GUIDE

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We believe in the transformative power of events! Remarkable outcomes emerge from bringing together quality individuals for encouragement, learning, growth, and the recognition of hard work. Throughout the year, we host numerous events that offer agents the chance to step beyond their daily routines and network with the industry's best. We also believe in the importance of pursuing ambitious goals. To facilitate this, we've created an incentive trip designed to inspire and reward. Who says work can't be fun?

# MEETINGS & EVENTS

# 04





# THE MAIN EVENT



Held in Branson, Missouri, **the Main Event is designed to empower** agents and agency owners with simplified tools and processes that will allow them to grow and scale their sales and businesses. During the Main Event you will hear from inspiring people who will excite and motivate you, do not miss the powerful simple tools that speakers will share with you that you can take immediate action on to increase sales, help your downline agents win, and grow your business. All business leaders who are winning at a high level say that networking at events is the number one thing that they do to win. Show up. Engage. Transform your business.

## GET IN THE ROOM!

### **We believe in the power of community**

– a great community provides belonging, stability, and strength.

### **We believe in the power of collaboration**

– It makes us all better.

*Community and collaboration cultivated in an environment of mutual respect, open communication, shared goals, and a relentless commitment to growth & development create a Championship Culture.*







# THE FALL EVENT



Held in the heart of downtown Louisville, the **Fall Meet is designed to help you level up**, connect to agents who are winning, and have some fun before your end of the year push! At the Fall Meet, we will dive deep into life insurance telesales, maximizing your medicare opportunities and finding annuities with the best training team in the industry.

**Our goal is to give you the tools that you need to finish the year with a bang! Why not make it a record year?**

We will wrap the event with a night at Churchill Downs for dinner, music, and horseracing under the lights at **Downs After Dark.**





# IMPACT LIVE



## Your Vision Should be More Than a Passing Dream.

It is Time to Ignite Your Confidence and Unlock Your Potential.

Impact Live is a collaborative and immersive educational and training experience designed to help you grow your business. Impact Live Provides an opportunity to discover and share the life-changing Impact business model, as well as the hands-on-training you need so you are empowered to increase your sales, and grow your business.



## MEDICARE TRAINING & LIVE SEMINARS

## ANNUITY TRAINING & LIVE RETIREMENT SEMINARS

## LIFE INSURANCE TELE-SALES TRAINING

UNLOCK YOUR POTENTIAL



<https://impactlegacygroup.com/impact-live/>



# ONBOARDING GUIDE



Our number one priority is your profitability. Many agents in this industry fail because they are not equipped with the proper tools they need to be successful. Success in business requires confidence and efficiency. Our goal is to provide you with all the tools that you need to confidently serve your clients as efficiently as possible.

# TOOLS & RESOURCES

# 05





# IMPACT LINK



*Maximize your business with a revolutionary digital platform for the Insurance Industry*

Impact Link is an industry changing, comprehensive digital dashboard that gives you complete visibility of your business. It allows you to see the status of your agents' onboarding, contracting and your team's submitted and issued paid business..

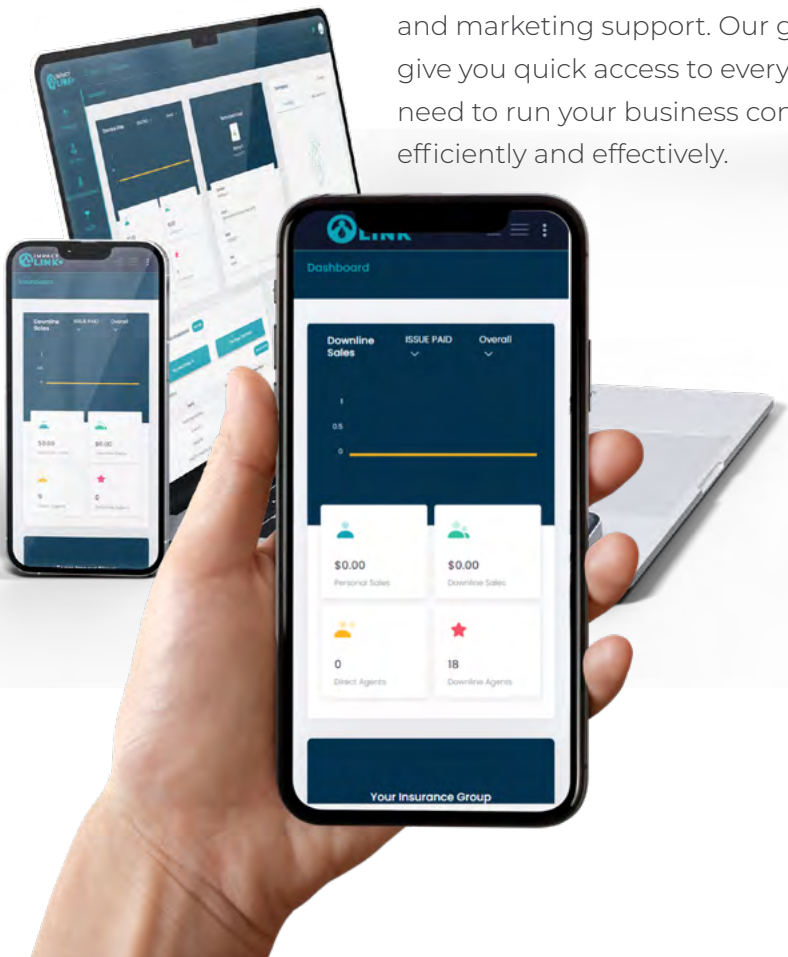
Impact Link also gives you immediate access to training, leads, recruiting, and marketing support. Our goal is to give you quick access to everything you need to run your business confidently, efficiently and effectively.

- Dashboard
- Get On The Leaderboard
- Visual Hierarchy (My Team)
- My CRM
- Support
- Impact Leads
- Impact Store
- Impact Training Center
- Annuity & Retirement Support
- Agency Rocket
- Underwriting & Quoting
- Impact Recruiting Tools
- Compensation Grids
- Impact Calendar
- Impact Live
- Launch a New Agent
- Contracting
- Awards and Incentives

SCAN HERE

**A revolutionary tool  
designed to maximize your  
business**

<https://www.myimpactlink.com/impact-link>







# IMPACT LINK+



**Empower your business for growth and profitability with our groundbreaking tools and resources.**

We're excited to introduce our very own, industry leading CRM built exclusively for Impact sales agents and team builders! This user-friendly tool is loaded with features to help you stay organized and work more efficiently.

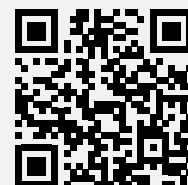
With an integrated autodialer, you can speed up your calls, while automated emails and texts keep you connected with your clients and leads effortlessly. Plus, our CRM offers an easy-to-use pipeline creation and management system, making it simple to track your sales progress.

**Make the most of this powerful resource, exclusively available to the Impact family.**

- Disposition Sales Leads
- Manage & Notate Clients
- Track Licensed & Unlicensed Recruits
- Choose Phone Numbers for Outbound Click-to-call Dialing
- Automatic Integrated Power Dialer
- Recorded Phone Calls
- Automated SMS & Email Communications
- Create & Send SMS & Email Marketing Messages
- Reporting & Analytics
- Import Leads, Customers & Recruits
- Export Entire Universe of Your Data
- Dedicated Calendar
- Centralized Conversations Area
- Email & SMS Activity Tracking
- Notes, Tasks, & Appointment Setting Functionality
- Create & Store Templates



SCAN HERE



<https://app.impactlegacygroup.com/>



# IMPACT LEADS

Spend more time selling and less time prospecting. We take the guesswork out of sourcing potential clients and make it easy for you to maximize your time.

**Impact Legacy Group** supports our agents and strategic partners with industry leading marketing and leads resources.

*We have developed marketing and lead strategy programs for Medicare, Final Expense Sales, Mortgage Protection, Annuities & Retirement Planning, and more.*



**Your Lead Purchase with us is 100% exclusively yours!**

While overflow leads and aged leads are available, no leads received from your mailing campaigns or digital campaigns are ever resold.

## Have confidence in your investment

What sets us apart? Our team has over 100 years of combined experience in lead management. We have personally used the same type of leads that are available for sale, and have converted sales on a high level. We have many agents who are seeing up to a 10 times return on their investment.

**Increase your sales with proven affordable leads**

<https://leads.impactlegacygroup.com/>



# SUPPORT TICKETS

Our team is dedicated to serving you and your team. If you have any contracting issues or concerns, please fill out a Support Ticket located in ImpactLink.



## CONTRACTING SUPPORT

<https://impactlegacygroup.com/contracting>



## AGENT SERVICES SUPPORT

<https://impactlegacygroup.com/agentservices>



## RECRUITING SUPPORT

<https://impactlegacygroup.com/recruiting>





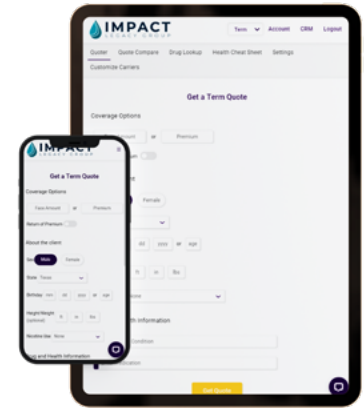
# IMPACT TOOLS



## Insurance Toolkits

Discover our game-changing underwriting tool that makes life easier for agents! With this easy-to-use platform, you can effortlessly assess potential clients' underwriting considerations by simply listing diagnoses and medications. Get carrier recommendations for all your simplified issue term, whole life, and Medicare products in no time. Our e-app functionality helps agents go paperless by digitizing the application process. Your customers will love the convenience of applying for insurance coverage and signing applications electronically Agency Rocket

Impact Legacy Group has partnered with Agency Rocket to offer agents a complete sales support system for serving high networth clients with a vision for their futures. Agency Rocket offers support in two key areas.



<https://tools.impactlegacygroup.com/insurance-toolkits>



## Agency Rocket™



## Debt Action Plan™

The Debt Action Plan platform provides all the tools you need to market the infinite banking concept of debt elimination and wealth building using participating whole life insurance. Use the scenario builder to capture your client's financial profile to determine the best strategy with precise instructions mapped out before them including beautiful reports and revolutionary interactive tools.



<https://agencyrocket.com/impact>



## my new retirement™

Designed to educate the consumer on using Indexed Universal Life (IUL) as a retirement strategy, the My New Retirement platform combines prospecting tools, business management tools and the incredible IUL Analyzer which creates a visually compelling interactive presentation that lays out the superior benefits of the IUL strategy in an irrefutable way.





# ONBOARDING GUIDE

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Excellence is our guiding principle, driving us to exceed expectations and deliver exceptional value. Our training is designed to meet the needs of our clients and help agents make money as quickly as possible. We provide world-class training opportunities that are easy to understand and implement.

# TRAINING

# 06



# TRAINING



At Impact Legacy Group, our training program stands as the cornerstone of our commitment to empowering our agents and agencies with the knowledge and skills necessary to thrive in the insurance market. Designed with precision and expertise, our Training Center serves as a comprehensive resource for our strategic partners seeking to master their craft with confidence and proficiency.

Through a blend of interactive bootcamps, personalized coaching, and cutting-edge resources. At Impact Legacy Group, we believe that investing in education is the key to unlocking untapped potential and forging a path toward a brighter, more prosperous future for all.



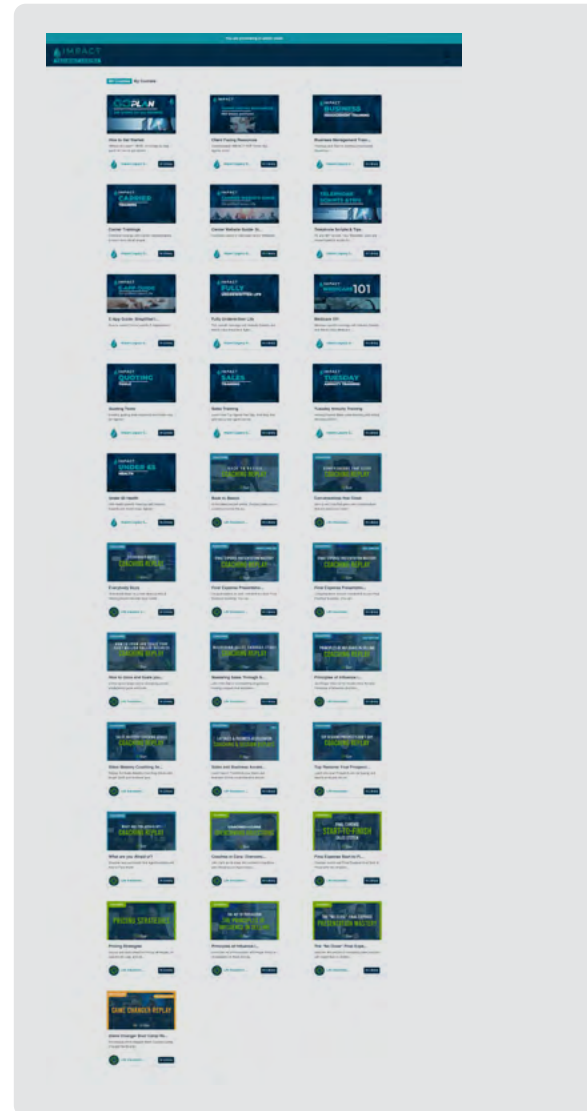


# TRAINING CENTER



*The Training Center is an on-demand video and resource library that is designed to give you the tools you need and help you eliminate sales anxiety, convert more sales and help you make more money.*

The Training Platform is a dynamic program that is frequently updated with **FREE**, fresh and new content that **includes Cody Askins sales system and the Life Insurance Academy Complete Course Library.**



**BROWSE THE COURSE LIBRARY NOW**



<https://portal.impactlegacygrouptrainingcenter.com/>



## MONDAY MORNING LAUNCH CALL

Executive Team



**Monday**  
8:30 AM CST / 9:30 AM EST

We are made for Impact! Each week we come together to inspire, motivate and celebrate our community. Get your week started with focus, energy and enthusiasm

<https://impactlegacygroup.com/Launch>

## ANNUITIES, LIFE, AND LONG-TERM CARE TRAINING

Pat Schmidt / Matt Smith



**Tuesday**  
9:00 AM CST / 10:00 AM EST

Annuities, traditional life, and long-term care products do not need to be confusing. Many agents do not write this type of business because they do not know how. This can leave the client in an undesirable position. Matt Smith and Pat Schmidt are here to help you gain a better understanding of these important product lines so that you feel empowered to serve your clients better.

<https://impactlegacygroup.com/retiretraining>

## THIS IS IMPACT/SIMPLIFIED LIFE ONBOARDING/TRAINING

Agent Services / Chris Ball



**Wednesday**  
9:00 AM CST / 10:00 AM EST

Join us each week as we provide you with practical tools to enhance your efficiency in life sales. We alternate weekly between showcasing a chosen carrier partner and highlighting key tools and resources within Impact Link to simplify your sales processes, boost your competence and become more profitable.

<https://impactlegacygroup.com/impactsimplife>

## LIFE INSURANCE ACADEMY COACHING CALL

Life Insurance Academy Team



**Thursday**  
9:30 AM CST / 10:30 AM EST

Are you ready to win? Each week we give you TRANSFERABLE tools that will empower you to sell more and grow your agency. Do not miss this opportunity to level up! Get answers, discover a path, grow your business!

<https://lifeinsuranceacademy.org/coaching>

## MEET THE PARTNERS

Executive Team



**Thursday**  
5:30 PM CST / 6:30 PM EST

To assist you in your recruiting and onboarding efforts, the Impact Executive Team, wanted to provide an opportunity to meet and connect with your prospective new agents and team builders. We're looking forward to meeting your potential newest partners. We're excited to help you grow!

<https://impactlegacygroup.com/mtp>

## MEDICARE, HEALTH AND ANCILLARY PRODUCT TRAINING

Ty James / Dallas Keithley



**Friday**  
9:00 AM CST / 10:00 AM EST

Millions of Americans are seeking competent guidance for their Medicare and health insurance needs. The process can be confusing, and they need someone to guide them through what often appears to be a complex maze. Ty James and Dallas Keithley are dedicated to clearing the fog for agents, empowering them to offer better guidance to their clients. Medicare, health, and ancillary products present significant selling and cross-selling opportunities. Don't miss out on this valuable training!

<https://impactlegacygroup.com/101>





# LIFE INSURANCE ACADEMY



The premier training and coaching academy & online resource for insurance sales. The Life Insurance Academy trains agents and agencies around the world to help grow sales, scale business, increase profit, and expand impact. While on the Life Insurance Academy page you'll find podcasts, video courses, downloadable tools, and supporting sales resources. Content covered includes prospecting, leads, how to approach your clients, proven sales processes, top-producing presentations, effective pricing strategies, closing techniques, client care, sales psychology, agency growth strategies, and much more. Life Insurance Academy helps take the guesswork out of life insurance sales with On-demand courses, coaching, and resources to help you earn more money.



**LIFE INSURANCE ACADEMY**  
**YOUTUBE CHANNEL**

@LifeInsuranceAcademy



**LIFE INSURANCE ACADEMY**  
**FACEBOOK PAGE**

facebook.com/lifeinsureacad



**LIFE INSURANCE ACADEMY**  
**INSTAGRAM**

@lifeinsureacad



# MEDICARE SALES PLAYBOOK



Dive into the world of Medicare with the Medicare Sales Playbook Podcast, your essential resource for mastering the complexities of the industry. Hosted by the energetic and insightful Dallas Keithley, this podcast stands as a guiding light for insurance agents aiming to elevate their Medicare business, one strategic play at a time.

Dallas, alongside a roster of industry experts, cuts through the noise to deliver clarity, positivity, and actionable strategies. This podcast addresses the ever changing landscape of Medicare, plans and product benefits. With interviews and insights from industry leaders, the Medicare Sales Playbook Podcast provides sales and business growth strategies for the new and seasoned agent alike.

Whether you're seeking to refine your skills, expand your knowledge, or connect with a supportive community, this podcast promises to equip you with the tools you need to succeed in the Medicare landscape. Tune in weekly to join Dallas and his guests on this journey towards becoming a standout agent in the Medicare insurance world.





# ONBOARDING GUIDE

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At Impact, we understand the importance of fighting for achievement and recognition. It's what drives us to push our limits, conquer the obstacles in our path, and strive for greatness. When we actively pursue our goals and pour our hearts into achieving them, we cultivate a strong sense of purpose and motivation. This fight validates all the hard work we put in, boosts our self-esteem, and fills us with an incredible sense of accomplishment. It isn't just about us, our journey becomes an inspiration for others, showing them the incredible rewards that come from unwavering determination and never giving up.

**"We are what we repeatedly do.  
Excellence then, is not an act, but a habit."**  
– Aristotle

# GROWTH & RECOGNITION

# 07





# LEADERBOARD



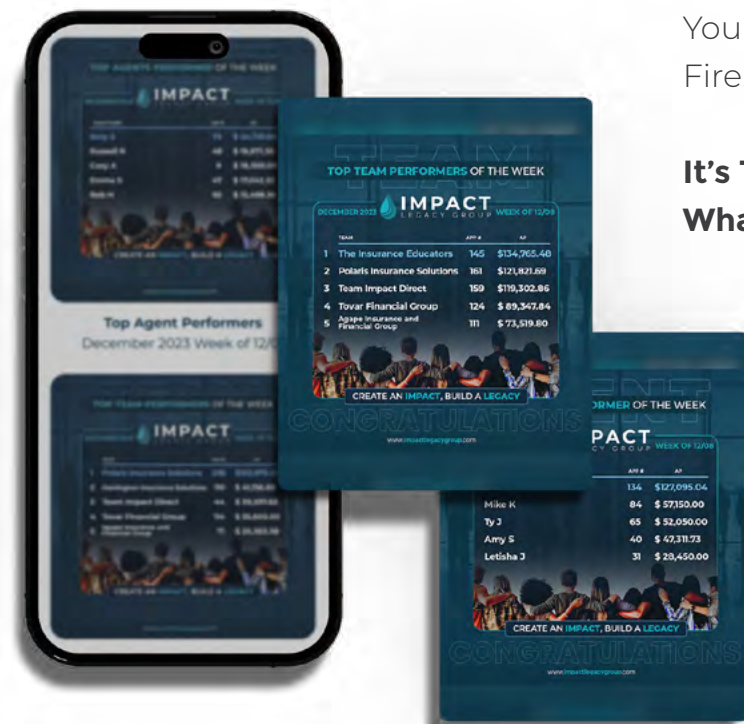
Ready to see where you stand among the best in the company? Our dynamic leaderboard, updated in real-time, offers you the opportunity to measure your performance and track your progress.

***Embrace the challenge and fuel your drive for success.***

Located on Impact Link Dashboard

We Provide the Platform for You to Make Your Name Known, Ignite Your Competitive Fire, and Surpass Expectations.

**It's Time to Find Out  
What You Are Made Of.**



<https://impactlegacygroup.com/awards-and-incentives/>





# LEGACY AWARDS



Legacy Awards are designed to reward activity for both producers and business builders.

**Legacy Awards** are designed to reward activity for both producers and business builders. In the ILG Legacy Awards system, reaching the pinnacle of success unlocks the exclusive Prestige Level for personal sales and team sales, a unique opportunity to reset your progress and begin a new, showcasing your relentless pursuit of excellence. As you ascend through this level multiple times, you earn distinctive badges or icons, visible to your peers, signaling your continued commitment to surpassing the highest standards. Embrace the Prestige Level and proudly display your badge of honor, a symbol of unmatched “**Prestige**” and a testimony to your dedication and resilience in the eyes of fellow team members.



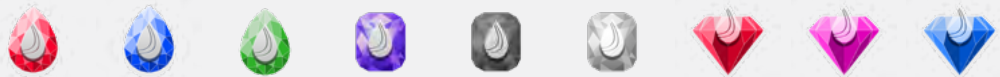


# LEGACY AWARDS

## PERSONAL PRODUCTION

### LEGACY AWARDS

Complete to Unlock Prestige Level 1



### PRESTIGE LEVEL 1

Complete to Unlock Prestige Level 2



### PRESTIGE LEVEL 2

Complete to Unlock Prestige Level 3



### PRESTIGE LEVEL 3

Top Legacy Prestige Award Ranks – Personal



#### RUBY - PERSONAL

**\$9,000 PV** Submitted over 3 weeks

#### SAPPHIRE - PERSONAL

**\$12,000 PV** Submitted over 3 weeks

#### EMERALD - PERSONAL

**\$15,000 PV** Submitted over 3 weeks

#### TANZANITE - PERSONAL

**\$4,000 PV** Submitted 6 out of 8 weeks

#### BLACK OPAL - PERSONAL

**\$5,000 PV** Submitted 9 out of 12 weeks

#### DIAMOND - PERSONAL

**\$6,000 PV** Submitted 12 out of 16 weeks

#### RED DIAMOND - PERSONAL

**\$8,000 PV** Submitted 10 weeks consecutively

#### PINK DIAMOND - PERSONAL

**\$10,000 PV** Submitted 10 weeks consecutively

#### BLUE DIAMOND - PERSONAL

**\$15,000 PV** Submitted 10 weeks consecutively



# LEGACY AWARDS

## TEAM PRODUCTION

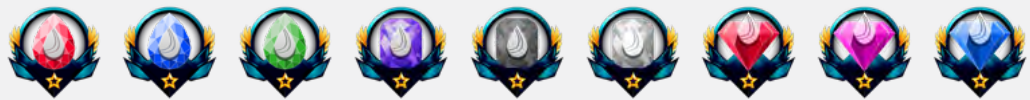
### LEGACY AWARDS

Complete to Unlock Prestige Level 1



### PRESTIGE LEVEL 1

Complete to Unlock Prestige Level 2



### PRESTIGE LEVEL 2

Complete to Unlock Prestige Level 3



### PRESTIGE LEVEL 3

Top Legacy Prestige Award Ranks – Team



#### RUBY - TEAM

**\$50,000 PV** Submitted over 3 weeks

#### SAPPHIRE - TEAM

**\$75,000 PV** Submitted over 3 weeks

#### EMERALD - TEAM

**\$100,000 PV** Submitted over 3 weeks

#### TANZANITE - TEAM

**\$40,000 PV** Submitted 6 out of 8 weeks

#### BLACK OPAL - TEAM

**\$50,000 PV** Submitted 9 out of 12 weeks

#### DIAMOND - TEAM

**\$60,000 PV** Submitted 12 out of 16 weeks

#### RED DIAMOND - TEAM

**\$80,000 PV** Submitted 10 weeks consecutively

#### PINK DIAMOND - TEAM

**\$100,000 PV** Submitted 10 weeks consecutively

#### BLUE DIAMOND - TEAM

**\$150,000 PV** Submitted 10 weeks consecutively



# IMPACT AWARDS

*The Impact Awards are our way of recognizing the determination and excellence of our top-performing agents and agencies from the past year.*

These awards, based on issued and paid business, highlight the value that our agents contribute. If you're among the standouts in your specific market or across multiple ones, you could find yourself in the running. But the real heart of these awards, and our organization, is our commitment to making a meaningful difference in the lives of our clients, families, and communities – our “**Difference Maker Moments**”. To celebrate these achievements, the **Impact Awards** will be presented annually at the **Main Event**.

## DIFFERENCE MAKER MOMENTS



\*Rookie of the year will be calculated for the first full year of being with Impact



\*Team Player will be an agent that shows great support to other agents(slack,helping others)



\*Exceptional Service is an agent that shows great service to others in the community



\*Builder of the year will be for the Agency owner that recruits the most new talent



TOP TEAMS  
ANNUITIES



TOP TEAMS  
LIFE



TOP TEAMS  
MEDICARE



TOP PRODUCERS  
ANNUITIES



TOP PRODUCERS  
LIFE



TOP PRODUCERS  
MEDICARE

## MADE FOR IMPACT



\$500,000 - Personal  
Production/Year



\$6 Million- Team  
Production/Year





# INCENTIVE TRIP



**YOU ARE MADE FOR IMPACT**

At **Impact**, we appreciate the sacrifices you make to prioritize your clients' needs. We recognize that while it might be easier to stick with one or two carriers and earn a trip to a luxurious location, you choose instead, to select the best product for your client. We believe that deserves a reward.

That's why we've established an incentive conference that appreciates you for diversifying your portfolio and serving your clients with the right attitude. This is for high personal producers and business builders.

<https://impactlegacygroup.com/awards-and-incentives/>





# IMPACT DIRECTORY

## BROOKE CHAMNESS

Director of Contracting

[Brooke.Chamness@impactlegacygroup.com](mailto:Brooke.Chamness@impactlegacygroup.com) - (417) 881 -0080 ext: 105  **slack**

- Organizing & Assigning Daily Priorities
- Carrier Relations
- Carrier Onboarding / Processes
- Management of Special Projects (audits etc)
- Daily review & assignment of all contracting@ emails
- Comp & Hierarchy Adjustments (assigning to team)

## JENNIFER ANDERSON

Director of Contracting

[Jennifer.Anderson@impactlegacygroup.com](mailto:Jennifer.Anderson@impactlegacygroup.com) - (417) 881 -0080 ext: 107  **slack**

- Organizing & Assigning Daily Priorities
- Carrier Relations
- Carrier Onboarding / Processes
- Management of Special Projects (audits etc)
- Daily review & assignment of all contracting@ emails
- Comp & Hierarchy Adjustments (assigning to team)

## CHLOE O'BRYAN

Contracting Team Member

[Chloe.Obryan@impactlegacygroup.com](mailto:Chloe.Obryan@impactlegacygroup.com) - (417) 881 -0080 ext: 111  **slack**

- Reviews all newly launched agents
- Verifies that all pre-contracting & onboarding documentation is satisfactory
- Reviews Onboarding Packet
- Completes SureLC Registrations
- Manages Missing Items

## LINDSEY HAINES


Contracting Team Member

[Lindsey.Haines@impactlegacygroup.com](mailto:Lindsey.Haines@impactlegacygroup.com) - (417) 881 -0080 ext: 204  **slack**

- Distribution of Carrier Contracts
- Missing Contract Requests
- New Carrier appointment requests
- Waiting for Upline Pipeline Stage Management (this task is shared with Chloe)

## HALEY WICKS

Contracting Team Member

[Haley.Wicks@impactlegacygroup.com](mailto:Haley.Wicks@impactlegacygroup.com) - (417) 881 -0080 ext:  **slack**

- Carrier Contract Processing
- Carrier Contracting Issues adjustments

## AMBER ZELEWICZ

Retirement Service Specialist Manager

[amber.zelewicz@impactlegacygroup.com](mailto:amber.zelewicz@impactlegacygroup.com) - (417) 881 -0080 ext: 2120  **slack**

- Case Design & Suitability
- New Business & Application Support

# IMPACT DIRECTORY

## DEAN CARPENTER

Contracting Support Specialist

[Dean.Carpenter@impactlegacygroup.com](mailto:Dean.Carpenter@impactlegacygroup.com) - (417) 881 -0080 ext: 113



- Support agents through the contracting process
- Troubleshooting of higher level contracting issues
- Contracting Updates
- Carrier Contracting Guidance
- Contracting Agent relations

## LESLIE MILLS

Contracting Support Specialist

[Leslie.Mills@impactlegacygroup.com](mailto:Leslie.Mills@impactlegacygroup.com) - (417) 881 -0080 ext: 2242



- Support agents through the contracting process
- Proactive Outbound Communications
- Contracting Updates
- Carrier Contracting Guidance
- Contracting Agent relations
- Contracts Summary email

## STEPHANIE MCCAHERN

Contracting Support Specialist

[Stephanie.mccahon@impactlegacygroup.com](mailto:Stephanie.mccahon@impactlegacygroup.com) - (417) 881 -0080 ext: 203

- Support agents through the contracting process
- Proactive Outbound Communications
- Contracting Updates
- Carrier Contracting Guidance
- Contracting Agent relations
- Hierarchy Build Sheet Management
- Agency Relationships

## BART PHILLIPS

Agent Support Specialist

[Bart.Phillips@impactlegacygroup.com](mailto:Bart.Phillips@impactlegacygroup.com) - (417) 881 -0080 ext: 6000



- Connecting agents to the Impact Community
- Onboarding: Slack - Impact Link- Training Center
- Slack Invite
- ImpactLink Credentials / Support
- Training Center Credentials
- Agent Services Support
- Lead Support

## MATT SMITH

Director of Medicare Growth & Development

[M.Smith@impactlegacygroup.com](mailto:M.Smith@impactlegacygroup.com) - (417) 881 -0080 ext: 214



- Medicare Structuring / Onboarding
- Medicare Expert Review - Contracting Direction
- Medicare Sales Training & Support





Simple. Empowering. Profitable.