

Your Resource for Rates Instructions

A comprehensive guide to running Medicare Supplement and Final Expense quotes for your clients.





Accurate online Me x

www.tbrins.com/resource-for-rates-quote-tool.html

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The Brokerage Resource

TOOLS & RESOURCES MEDICARE LIFE & LONG-TERM CARE ANCILLARY NEWS & MEDIA ABOUT US

LOGIN

LEARN MORE

Gain access to our accurate, online **quote tool** for Medicare Supplement, Medicare Advantage, Hospital Indemnity, Senior Dental and Final Expense. This tool will give you the exact rates for every company, along with an Underwriting tool that will allow you to use the best carrier for your impaired risk clients.

We'll show you how to **effectively** use the tool, and which plan and insurer is the right choice for all of your prospective clients.

Interested in gaining access to Resource for Rates? We offer a complimentary trial period, even if you're not contacted with us.

INSTRUCTIONS

Step-by-step PDF instructions with screen shots, to help you get the rates you need, and downloaded in the format that works best for you.

SAMPLE REPORT

A sample of Medicare Supplement rates from our carriers.

YouTube Tutorial for Resource for Rates

Instant Meeting 2016 01 14 2

MEDICARE SUPPLEMENT

Client/Label	By	F (Under 65)	Age	Gender	Tobacco	Plan	Effective Date	Start By
010616	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16
011416	Health Plan of Country Insurance Company					Plan A	01/14/16	01/14/16





Logging into Resource for Rates

Your Resource for Rates

Quoting Tools

Email address

Password

Sign in

[Forgot Password?](#)

No Account?

[Request Account](#)

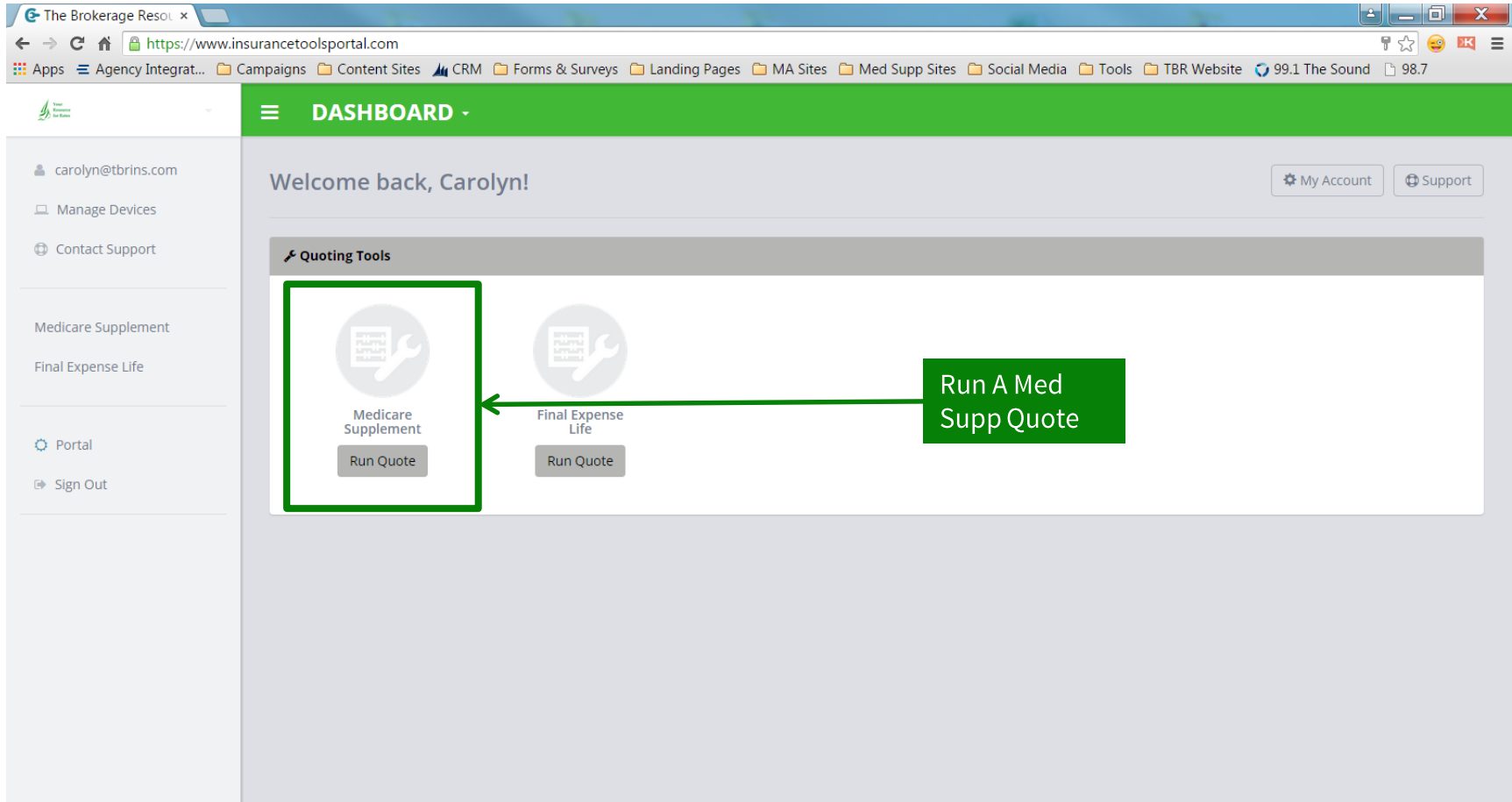
The Brokerage Resource Inc.: (919) 489-3600

Request a username if not already registered. Verify your email address, and credentials will be emailed to you.

Should you forget your password, click this link and an email will be sent to you to reset your password.



Medicare Supplement Quotes

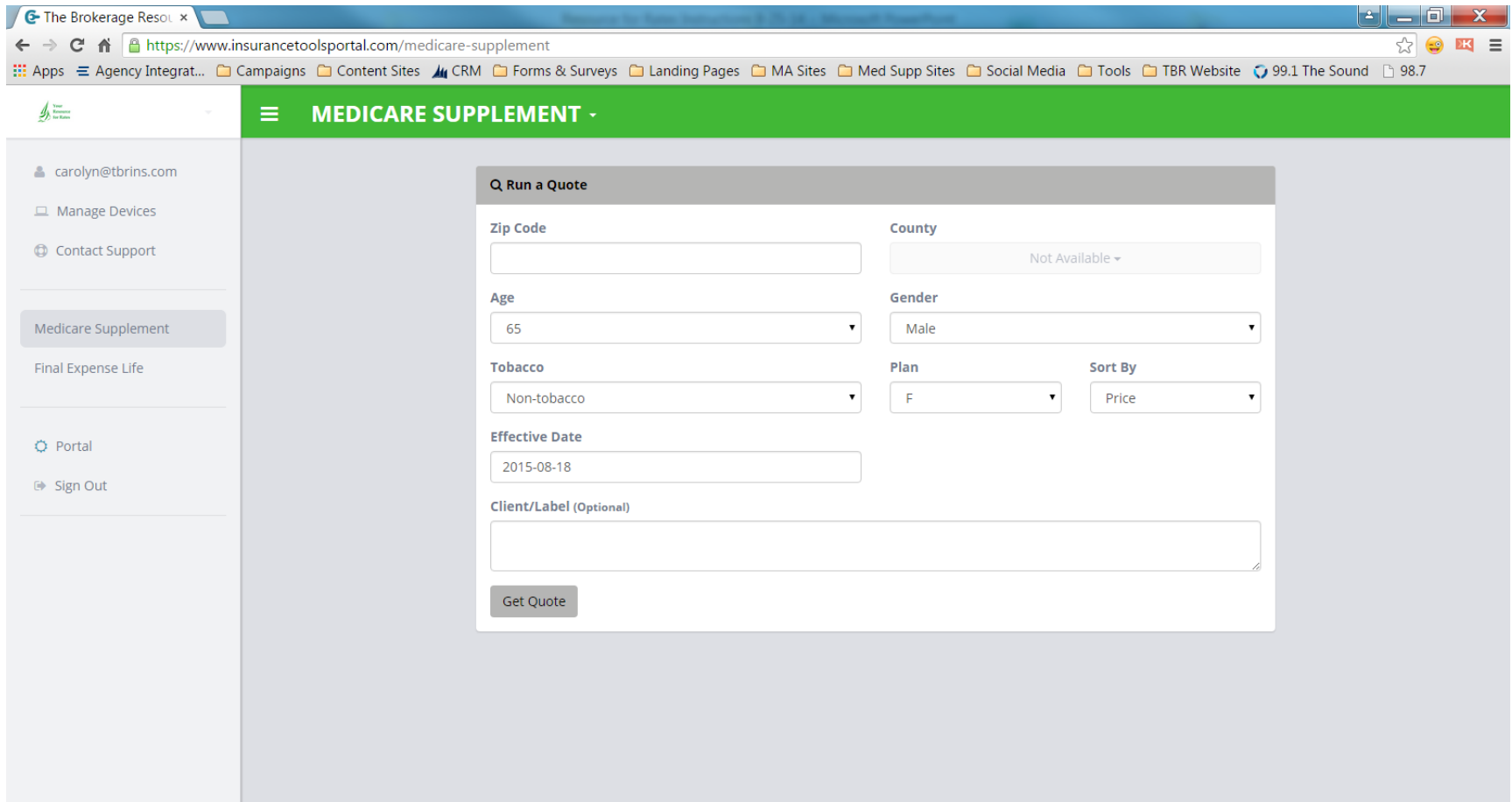


The screenshot shows a web browser window with the URL <https://www.insurancetoolportal.com>. The dashboard header is green and contains the text "DASHBOARD". Below the header, a grey bar says "Welcome back, Carolyn!". On the right side of this bar are buttons for "My Account" and "Support".

The main content area is titled "Quoting Tools" and contains two cards. The left card is titled "Medicare Supplement" and has a "Run Quote" button. This card is highlighted with a green border. The right card is titled "Final Expense Life" and also has a "Run Quote" button. A green arrow points from a green text box on the right, which says "Run A Med Supp Quote", to the "Medicare Supplement" card.

On the left side of the dashboard, there is a sidebar menu with the following items: "carolyn@tbrins.com", "Manage Devices", "Contact Support", "Medicare Supplement", "Final Expense Life", "Portal", and "Sign Out".





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https://www.insurancetoolsportal.com/medicare-supplement

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MEDICARE SUPPLEMENT

carolyn@tbrins.com

Manage Devices

Contact Support

Medicare Supplement

Final Expense Life

Portal

Sign Out

Q Run a Quote

Zip Code

County

Age

Gender

Tobacco

Plan

Sort By

Effective Date

Client/Label (Optional)

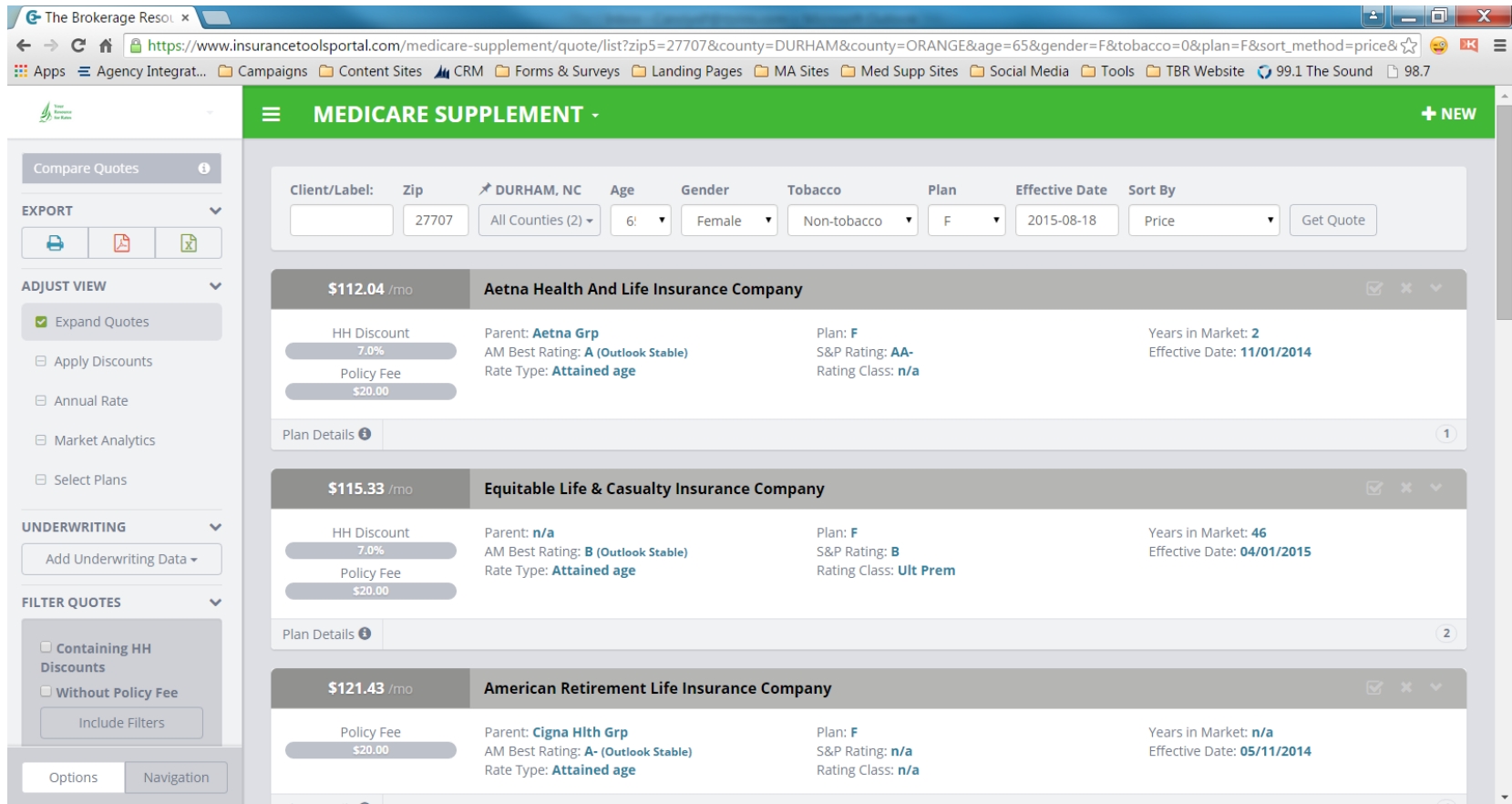
Get Quote



- The quote engine will deliver results for all carriers and all plans offered in the selected state. Plans A and F are always offered by all carriers.
- Generally with most carriers, the most popular plan is Plan F.
- Plan G is very similar to Plan F, the only difference being a \$166 annual physician deductible. Often the premium savings by purchasing Plan G, instead of Plan F, will be more than \$166 per year.
- If you need assistance choosing the correct plan for your client, please contact your Medicare Supplement Marketing Manager: [Mark Stafford](#), [Audrey Sunner](#) or [Cassandra Bennett](#).



Medicare Supplement Quotes



The screenshot shows a web browser window with the URL https://www.insurancetoolsportal.com/medicare-supplement/quote/list?zip5=27707&county=DURHAM&county=ORANGE&age=65&gender=F&tobacco=0&plan=F&sort_method=price&. The page title is "MEDICARE SUPPLEMENT" and it features a navigation menu with "Compare Quotes", "EXPORT", "ADJUST VIEW", "UNDERWRITING", and "FILTER QUOTES".

The main content area displays a search filter and three quote cards:

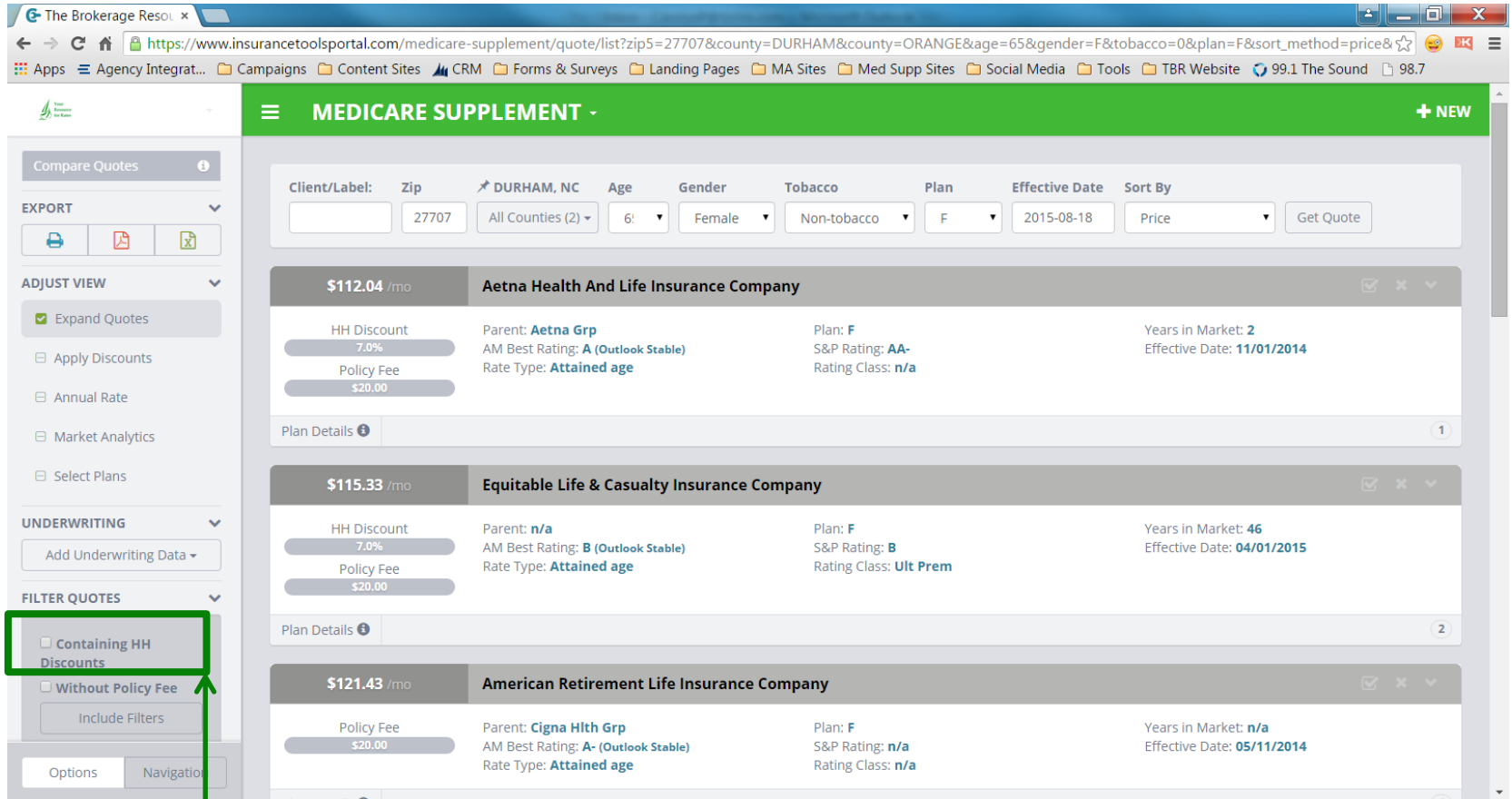
Client/Label	Zip	DURHAM, NC	Age	Gender	Tobacco	Plan	Effective Date	Sort By
	27707	All Counties (2)	65	Female	Non-tobacco	F	2015-08-18	Price

Quote Price	Company	HH Discount	AM Best Rating	Plan	Years in Market
\$112.04 /mo	Aetna Health And Life Insurance Company	7.0%	A (Outlook Stable)	F	2
\$115.33 /mo	Equitable Life & Casualty Insurance Company	7.0%	B (Outlook Stable)	F	46
\$121.43 /mo	American Retirement Life Insurance Company	7.0%	A- (Outlook Stable)	F	n/a

Each quote card also includes details such as "Parent", "Rate Type", "S&P Rating", "Rating Class", and "Effective Date".



Applying the Household Discount



MEDICARE SUPPLEMENT

Client/Label: Zip: DURHAM, NC Age: Gender: Tobacco: Plan: Effective Date: Sort By: Get Quote

Quote Price	Company	HH Discount	Parent	AM Best Rating	Rate Type	Plan	S&P Rating	Rating Class	Years in Market	Effective Date
\$112.04 /mo	Aetna Health And Life Insurance Company	7.0%	Aetna Grp	A (Outlook Stable)	Attained age	F	AA-	n/a	2	11/01/2014
\$115.33 /mo	Equitable Life & Casualty Insurance Company	7.0%	n/a	B (Outlook Stable)	Attained age	F	B	Ult Prem	46	04/01/2015
\$121.43 /mo	American Retirement Life Insurance Company		Cigna Hlth Grp	A- (Outlook Stable)	Attained age	F	n/a	n/a	n/a	05/11/2014

Filter Quotes:

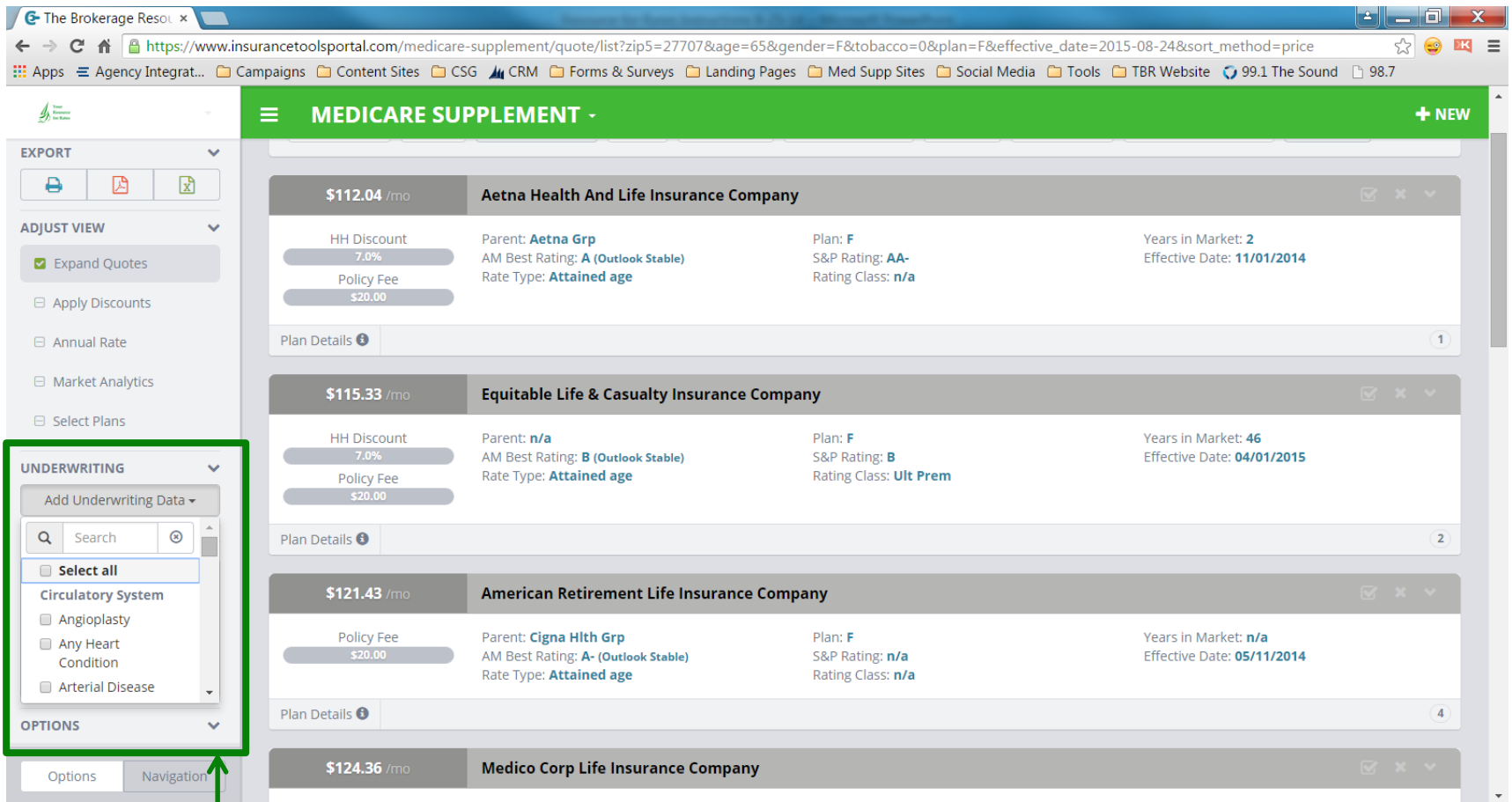
- Containing HH Discounts
- Without Policy Fee

Include Filters

Options Navigation

Apply any applicable household discount.





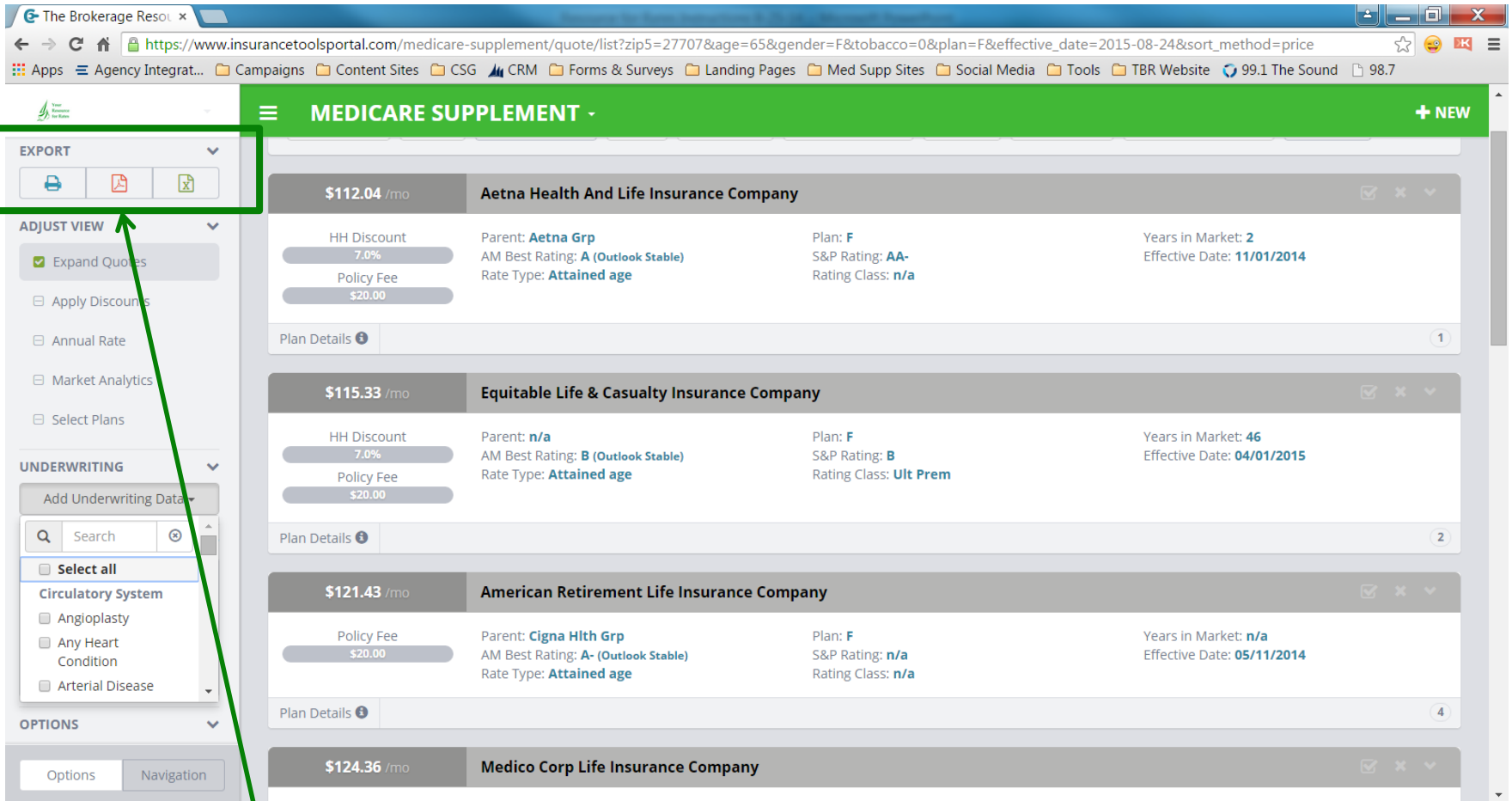
The screenshot shows a web browser window with the URL https://www.insurancetoolsportal.com/medicare-supplement/quote/list?zip5=27707&age=65&gender=F&tobacco=0&plan=F&effective_date=2015-08-24&sort_method=price. The page title is "MEDICARE SUPPLEMENT" and it features a sidebar with navigation options like "EXPORT", "ADJUST VIEW", and "UNDERWRITING". The "UNDERWRITING" dropdown menu is open, showing a search bar and a list of conditions: "Select all", "Circulatory System", "Angioplasty", "Any Heart Condition", and "Arterial Disease". A green box highlights this menu, and a green callout box points to it with the text "Select any impairments.".

Quote Price	Insurance Company	HH Discount	Parent	Plan	Years in Market	Effective Date
\$112.04 /mo	Aetna Health And Life Insurance Company	7.0%	Aetna Grp	F	2	11/01/2014
			AM Best Rating: A (Outlook Stable)	S&P Rating: AA-		
			Rate Type: Attained age	Rating Class: n/a		
\$115.33 /mo	Equitable Life & Casualty Insurance Company	7.0%	n/a	F	46	04/01/2015
			AM Best Rating: B (Outlook Stable)	S&P Rating: B		
			Rate Type: Attained age	Rating Class: Ult Prem		
\$121.43 /mo	American Retirement Life Insurance Company		Cigna Hlth Grp	F	n/a	05/11/2014
			AM Best Rating: A- (Outlook Stable)	S&P Rating: n/a		
			Rate Type: Attained age	Rating Class: n/a		
\$124.36 /mo	Medico Corp Life Insurance Company					

Select any impairments.



Exporting Your Results & Downloading



The screenshot shows a web browser window displaying a Medicare Supplement quote list. The browser address bar shows the URL: https://www.insurancetoolsportal.com/medicare-supplement/quote/list?zip5=27707&age=65&gender=F&tobacco=0&plan=F&effective_date=2015-08-24&sort_method=price. The page title is "MEDICARE SUPPLEMENT".

The left sidebar contains several sections:

- EXPORT**: Contains icons for Print, PDF, and Excel.
- ADJUST VIEW**: Includes "Expand Quotes" (checked), "Apply Discounts", "Annual Rate", "Market Analytics", and "Select Plans".
- UNDERWRITING**: Includes "Add Underwriting Data", a search bar, and a list of checkboxes: "Select all", "Circulatory System", "Angioplasty", "Any Heart Condition", and "Arterial Disease".
- OPTIONS**: Includes "Options" and "Navigation" buttons.

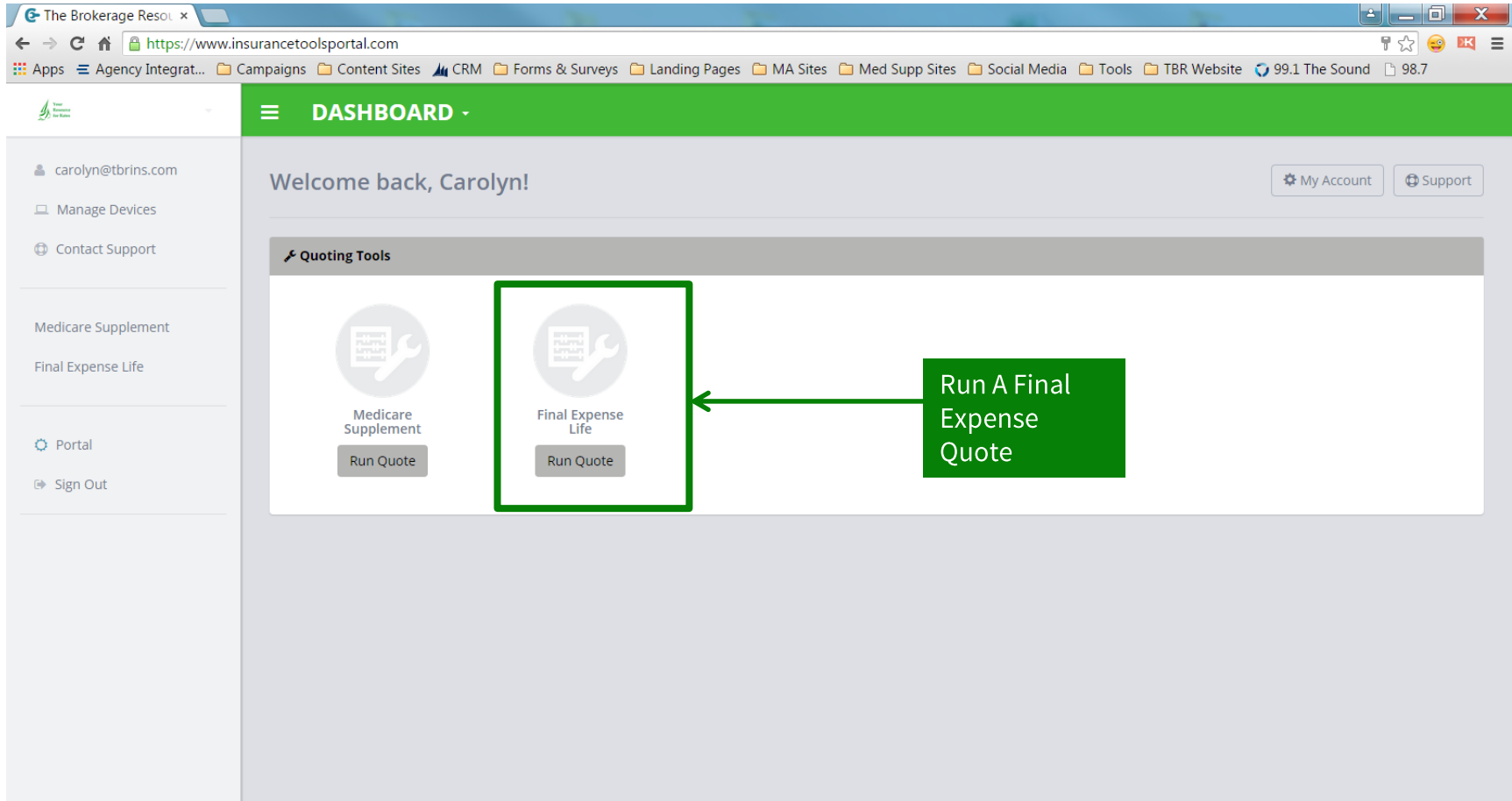
The main content area displays a list of Medicare Supplement quotes:

Quote Price	Insurance Company	Parent	Plan	Years in Market	Effective Date
\$112.04 /mo	Aetna Health And Life Insurance Company	Aetna Grp	F	2	11/01/2014
HH Discount: 7.0%	AM Best Rating: A (Outlook Stable)	S&P Rating: AA-	Rating Class: n/a		
Policy Fee: \$20.00	Rate Type: Attained age				
\$115.33 /mo	Equitable Life & Casualty Insurance Company	n/a	F	46	04/01/2015
HH Discount: 7.0%	AM Best Rating: B (Outlook Stable)	S&P Rating: B	Rating Class: Ult Prem		
Policy Fee: \$20.00	Rate Type: Attained age				
\$121.43 /mo	American Retirement Life Insurance Company	Cigna Hlth Grp	F	n/a	05/11/2014
Policy Fee: \$20.00	AM Best Rating: A- (Outlook Stable)	S&P Rating: n/a	Rating Class: n/a		
Rate Type: Attained age					
\$124.36 /mo	Medico Corp Life Insurance Company				

Download/Print
your quotes



Final Expense Quotes



The screenshot shows a web browser window with the URL <https://www.insurancetoolsportal.com>. The browser's address bar and tabs are visible at the top. Below the browser, there is a green navigation bar with a hamburger menu icon and the word "DASHBOARD".

On the left side, there is a vertical sidebar with the user's email address `carolyn@tbrins.com` and several menu items: "Manage Devices", "Contact Support", "Medicare Supplement", "Final Expense Life", "Portal", and "Sign Out".

The main content area of the dashboard has a green header that says "Welcome back, Carolyn!". To the right of the welcome message are two buttons: "My Account" and "Support".

Below the welcome message is a section titled "Quoting Tools". It contains two cards. The first card is for "Medicare Supplement" and has a "Run Quote" button. The second card is for "Final Expense Life" and also has a "Run Quote" button. This second card is highlighted with a green rectangular border. A green arrow points from a green callout box on the right to the "Final Expense Life" card. The callout box contains the text "Run A Final Expense Quote".



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https://www.insurancetoolsportal.com/final-expense-life/quote/list?zip5=27707&age=65&gender=F&tobacco=0&desired_face_value=10000&benefit_name=Level+Benefit&sort_method=

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FINAL EXPENSE LIFE

+ NEW

Compare Quotes

EXPORT

ADJUST VIEW

- Expand Quotes
- Apply Fees
- Annual Rate

UNDERWRITING

Add Underwriting Data

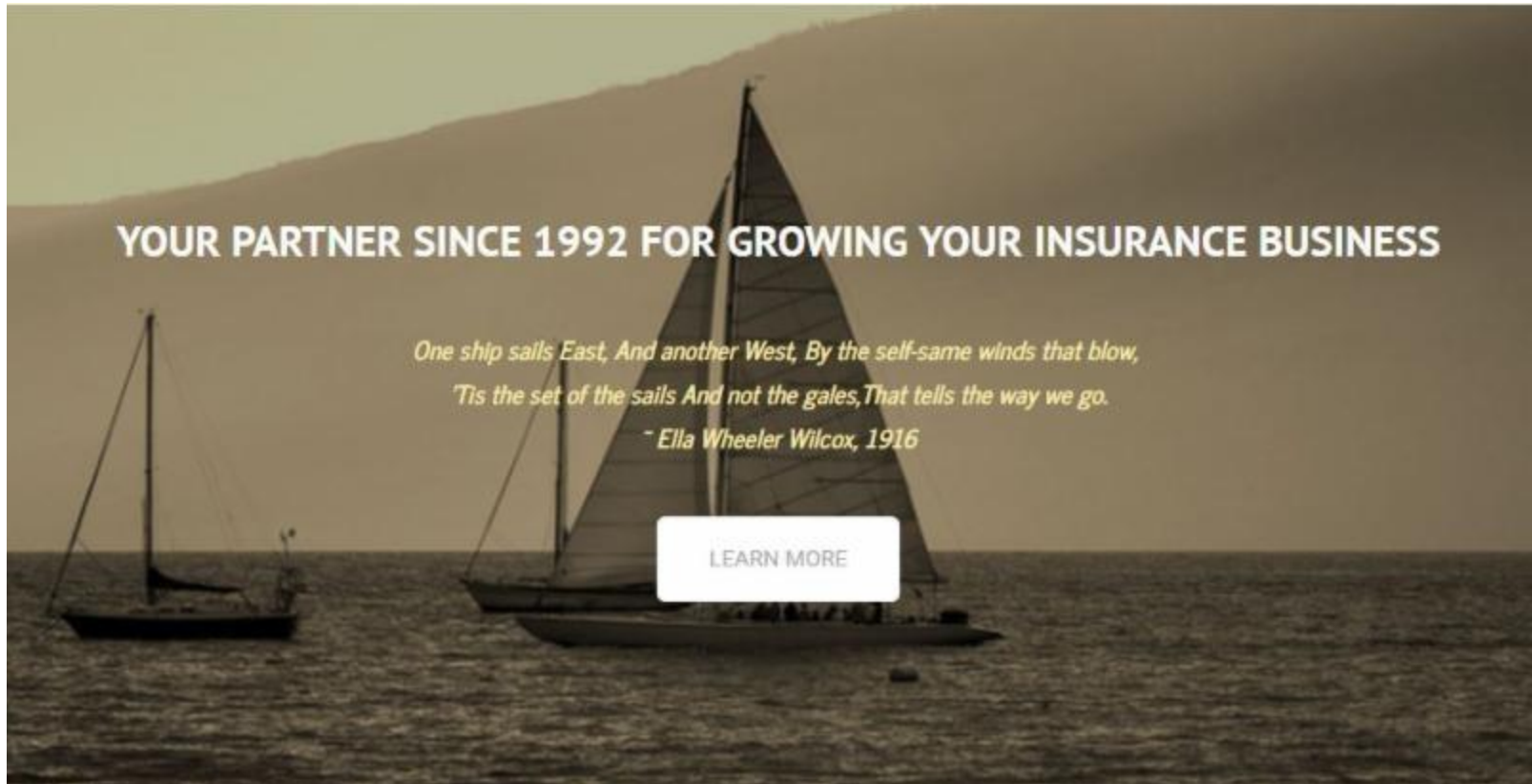
OPTIONS

- Contact Support
- About Quote

Options Navigation

Client/Label:	Zip	Age	Gender	Tobacco	Face Value	Monthly Rate	Product Type	Sort By	Get Quote
	27707	61	Female	Non-tobacco	\$10,000		Level Benefit	Price	
\$33.60 /mo United Home Life Insurance Company									
Annual Fee	Plan: Provider - Preferred		Parent Company: Indiana Farm Bureau Grp		Years in Market: n/a		Underwriting: Full		
\$50.00	AM Best Rating: n/a		S&P Rating: n/a						
Plan Details 1									
\$37.33 /mo United Home Life Insurance Company									
Annual Fee	Plan: Provider - Standard		Parent Company: Indiana Farm Bureau Grp		Years in Market: n/a		Underwriting: Full		
\$50.00	AM Best Rating: n/a		S&P Rating: n/a						
Plan Details 2									
\$37.81 /mo United Of Omaha Life Insurance Company									
Annual Fee	Plan: Living Promise		Parent Company: Mutual Of Omaha Grp		Years in Market: 7		Underwriting: Full		
\$36.00	AM Best Rating: A+ (Outlook Stable)		S&P Rating: A+						
Plan Details 3									
\$38.05 /mo Transamerica Premier Life Insurance Company									
Annual Fee	Plan: Preferred		Parent Company: Aegon Us Holding Grp		Years in Market: n/a				





If you have questions about running quotes, please contact our staff:

Communications & Marketing Manager: [Carolyn Portanova](#) at 919.794.3179 Senior Solutions Marketing Managers: [Mark Stafford](#) at 919.794.3178, [Audrey Sunner](#) at 919.794.3084 or [Cassandra Bennett](#) at 919.794.3182.

