



The Brokerage Resource  
Insurance Marketing Organization

AN INTEGRITY COMPANY

## Who is The Brokerage Resource?

As an independent, professional producer, you need accurate and timely information, not only about insurance products, but also about the marketplace in general. Partnering with an agency that has their finger on the pulse of the ever-changing marketplace, whose primary focus is on senior products, and holds contracts with A rated carriers that offer the best solutions for your clients, is a compelling reason to do so. As an Insurance Marketing Organization, we have been in the senior healthcare and life insurance markets since 1992. We offer the best selection of insurance products for your clients, and we remain of **Mutual of Omaha's** largest top ten distributors for Medicare Supplements in the country. Among our list of other highly acclaimed carriers are: **Aetna, Accendo, Ameritas, Cigna, CSO, CVS Health, Gerber Life, Humana, John Hancock, Lumico, Medico, North American, TransAmerica, United American and United Healthcare (AARP).**





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## About us – Providing Wisdom for Four Generations

Since 1895 the Corey family has focused on outfitting the "ship" with the best insurance products and the best service for the journey. It all began with William B. Corey when he was 14 years old and began working for the Provident Friendly Society. A tireless and commanding figure, he helped transform PFS into Provident Indemnity Life Insurance Company and was its Board Chair when he retired. That 70 year continuous length of service is considered an industry record. Next came two sons, William S. Corey and Samuel C. Corey "Big Sam", who each dedicated over 40 years to the company, both of whom retired as Board Chairmen.

The legacy continued with Sam Corey, Jr. and his son Sam Corey, III, with over 60 years of combined insurance services. After 17 years of home office and TPA marketing, Sam Corey Jr. began a new BGA operation in 1992 and The Brokerage Resource was born. For 26 years Sam Jr. ran the field marketing organization on the principles of integrity, dedication and hard work. Sam III worked tirelessly beside him as Chief Marketing & Operations Officer and together they built the agency that it is today.

On January 1, 2018 Sam Corey, III purchased The Brokerage Resource from his father, and continued to steer the business in the direction his father set forth: growing the firm and adding a broad portfolio of insurance products to retain the best insurance agents nationally. Sam Jr. has continued to maintain a presence with the firm as the role of Founder.

In March 2020, The Brokerage Resource joined forces with Integrity Marketing Group to be a part of a nation-wide network of family FMOs. Together with Integrity Marketing Group, The Brokerage Resource now provides even more services, products, carriers and tools to their agents.



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“Nothing’s really changed  
except we bring a much  
bigger toolbox.”

Sam Corey, III  
*President, The Brokerage Resource*



### Why should you partner with us?

You can depend on The Brokerage Resource as a strategic partner benefiting from our experience and guidance as an industry leader. We strive to bring the best in innovative and financially strong carriers, cutting edge products, service, industry knowledge and expertise to your business. Our Sales team will help you choose carriers and products that are a correct fit for you and your client base. We offer insightful advice, guidance, tools and best practices to help you succeed. We are constantly keeping abreast of the ever-changing senior healthcare marketplace, and bring this information to you via our website, our emails, social media, our blog, our webinars and our phone conversations with you. Our Marketing team will assist you with materials and content to help promote your agency, to spread brand awareness and to give you the tools to market yourself digitally and via traditional methods.



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## Compensation & Contracts

We don't require any contractual obligations that require you to be captive. You retain your independence and are free to become appointed with as many carriers as you like. You are paid directly from the carriers that you represent and are in control of your own commissions and downlines.

## Products & Carriers

A strong focus on senior health insurance products is just good business today, and good business for the tomorrows. As the cost of healthcare continues to rise and the population continues to live longer, it's imperative for seniors to plan accordingly. Every year for the next 20 years close to 4,000,000 Americans will turn age 65, and the majority of those seniors need to purchase a Medicare Supplement or a Medicare Advantage plan. Long-term Care, Life insurance, Critical Illness, Dental, Vision & Hearing and Final Expense products are additionally important when planning for healthcare in retirement, so we've made this market a priority. Let us bolster your product portfolio with cost-effective, benefit-rich healthcare options for your clients.



## Prospecting & Leads

We offer several options for leads and prospects for new agents just starting out in the industry or for those looking to expand their client base. The first option is to become contracted with us, and we will set you up with free prospects through Giant Partners. You can decide what demographics you'd like and whether or not you want phone numbers or just mailing addresses. Our free prospects have been scrubbed against the 'Do Not Call' registry if you choose to call on them. Other options are to run Facebook ads ad get targeted leads or to purchase leads through ARM Leads, Kramer Direct or USA Data, backed by Mutual of Omaha.



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## Marketing & Advertising

We offer numerous resources for growing your business and marketing yourself successfully. Custom brochures, postcards, presentations, fact sheets and social media graphics are just a few of the branded marketing materials we can provide for you. Assistance with web design, logo design, social media platforms and ad content for promoted posts on social platforms are also part of our services. We believe all of our agents should have a digital presence. Your clients are researching you and their insurance options online and we make every effort to help you with your online marketing efforts.

## Incentives & Trips

Many of our carriers offer cash incentives, marketing credits and give-aways throughout the year, as well as expense-paid vacations for those who meet qualifying criteria.





## Tools & Resources

Only a few clicks away is your resource center for the entire sales process. Log in to the tools on our website or carrier agent portals and get access to quotes, forms and applications, contracts, commissions, case statuses and more. Call, e-mail or chat with us on our website for help or additional information. Our goal is to make doing business with us easy. We believe this only happens with:

- 24/7 online access to agent tools and resources
- Real-person, real-time access to our staff, Monday - Friday, 8 am - 5 pm
- Electronic applications
- Experienced underwriters
- Online quoting and rate tools
- Marketing assistance

We are here to assist you with growing your business, and with that comes a deep commitment to you, our customer and producer. For over 28 years we've helped agents and agencies with solutions. We'll help you select the best products for your clients, and we'll provide all the back-office support and service you need. We'll help you market your agency and teach you proven and effective ways to cross sell and grow your book of business.

## Contact Us

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We invite you to reach out to us or to visit our website to learn more. When you're ready to begin the contracting process, you can find that on our website. All of our contracting is done online. Should you have questions during the contracting process, live chat is available, or you can reach out to our Contracting department directly by e-mailing or calling our V.P. of Administration, Robiny Rhea.

**We look forward to working with you. Your success is our success.**