



PHIPTM

A G E N C Y

AN INTEGRITY **||** COMPANY



PREVAIL



PARTNERED WITH THE NATION'S TOP PROVIDERS:



SINCE 2009

- GROWN FROM 66 TO 60 K+ AGENTS
- OPENED 170+ OFFICES
- FOUNDED BY PATRICK BET-DAVID
- PROTECTED OVER 1 MILLION FAMILIES
- OUR VISION IS SAVING AMERICA BY BRINGING BACK FREE ENTERPRISE & HOPE TO AMERICAN FAMILIES
- OUR VISION IS 500K AGENTS BY 2029

7.1M+ SUBSCRIBERS



VALUETAINMENT

#1 CHANNEL FOR ENTREPRENEURS



3 PROBLEMS WE'RE SOLVING



DISTRIBUTION



FINANCIAL LITERACY



ENTREPRENEURSHIP





UNDER \$100K

- **PAYCHECK TO PAYCHECK**
- **LITTLE TO NO SAVINGS**
- **RENTING**
- **65+**
- **401K PLAN**
- **SOCIAL SECURITY**



OVER \$250K

- **INVESTMENTS**
- **Stocks**
- **Mutual Funds**
- **Insurance**
- **50+**
- **Own Properties**
- **Financially Free**

3 TYPES OF TRAINING



IN-PERSON TRAINING:

- WEEKDAY 7-9 PM: HOW TO RUN A BUSINESS
- WEEKEND 10-12 PM: HOW MONEY WORKS



FIELD TRAINING:

30 MINUTES DUPLICATING AN EXPERT IS BETTER THAN DOING IT YOURSELF



LICENSING:

DIFFERS PER STATE

- A. CLASS
- B. Test
- C. Fingerprints
- D. Licensing Fee

GETTING CLIENTS



WE DON'T DO **COLD CALLING, DOOR TO DOOR, OR BUY LEADS**



ALL OF OUR CLIENTS COME FROM **WORD OF MOUTH, REFERRALS, & SOCIAL MEDIA**

GETTING CLIENTS

- AGENT TEACHES CLIENT ABOUT INSURANCE & RETIREMENT.
- AGENT FINDS THE BEST COMPANY FOR THE CLIENT.
- COMPANY COMPENSATES THE AGENT.

CLIENT PAYS \$0 FOR OUR SERVICES

NO MARKUPS TO ANY COST





MAKE EXTRA INCOME



**BUILD A LEGACY FOR YOU &
YOUR FAMILY**

PART-TIME

5 CLIENTS PUT AWAY \$200 A MONTH INTO A POLICY:

- $\$200 \times 12 = 2,400$ POINTS
- $2,400$ POINTS \times 5 CLIENTS = $12,000$
- $12,000$ POINTS \times 50% =
 - **\$6,000 MONTHLY**
 - **\$72,000 ANNUALLY**

BROKER

10 LICENSED AGENTS:

- EACH LICENSED AGENT WRITES 5 POLICIES A MONTH
 - **@ \$200 A MONTH PREMIUM**
- $\$200 \times 12 = 2,400$ POINTS
- $2,400$ POINTS \times 5 POLICIES = $12,000$ POINTS/ MONTH
- $12,000$ POINTS \times 10 LICENSED AGENTS = $120,000$ POINTS
- AVERAGE BROKER SPREAD (40%) =
 - **\$48,000 MONTHLY**
 - **\$576K ANNUALLY**
- **YOUR PART-TIME AGENTS MAKE \$72,000 A YEAR**

RESIDUAL

INCLUDES YOUR PERSONAL POLICY + TEAM POLICIES

Most Carriers Pay $3\%+$ in residual

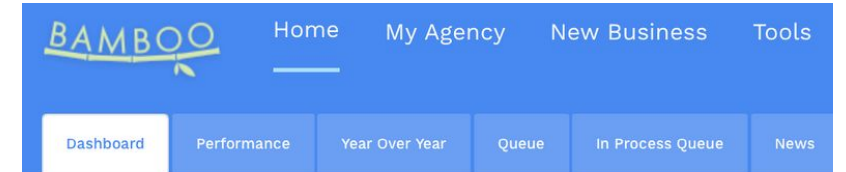
- PERSONAL PAID POINTS:
 $\$720,000 \times 3\% = \$21,600$
- BASE PAID POINTS (EXCLUDING PERSONAL): $\$2,945,000 \times 40\%$
OVERRIDE = $\$1,178,000 \times 3\%$
= $\$35,340$
- TEAM PAID POINTS (EXCLUDE BASE + PERSONAL): $\$4,757,000 \times 10\%$
OVERRIDE = $\$475,700 \times 3\%$
= $\$14,271$
- **TOTAL = \$71,211 YEARLY**

WHAT YOU NEED TO GET STARTED

**HOW
URGENT ARE
YOU?**

Time Commitment

- No hours, and no quotas.



\$199 Software "Bamboo"

- Submit policies electronically through all carriers.
- Manage your clients.
- Manage your agents.
- Manage licensing information.
- Training videos.
- FLS software.

BACKGROUND

- ❌ MISDEMEANORS
- ❌ FELONIES
- ❌ TAX LIENS
- ❌ BANKRUPTCIES

Licensing cost varies per state. Agent code is a tax write-off at the end of the year.



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