THE VALMARK RESOURCE UNIVERSE

EDUCATION AND RECOGNITION
- Customized Member Office Unique Team Process™
- The School of Life™
- The School of Excellence™
- VM Audio Newsletter
- The ValMark 401(k) Summit
- MDRT
- AALU
- Member Office Forum
- By the Numbers™
- Leaders and Founders Incentive Trip
- Partners in Success Program

BUSINESS CONTINUATION
- Next Financial Leaders Group™
- The ValMark Member Office Business Continuation Report™
- Exit Planning Strategies

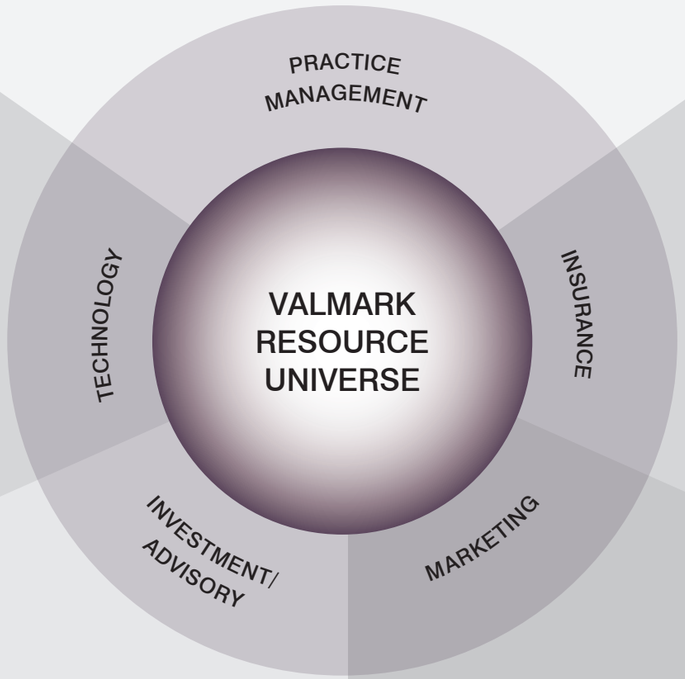
TRANSITION BREAKTHROUGH
- Synergy Filter
- The ValMark Resource Universe™ "R" Factor Procedure
- Customized Transition Blueprint
- Customized Member Office Unique Team Process™
- Business Launch System™

PRACTICE MANAGEMENT
- VM Desktop
- Member Office Website Creation
- Commissions on Demand™

INVESTMENT / ADVISORY
- Albridge / The ValMark Oneview™ System
- NetX360
- LaserApp

INSURANCE
- VitalSigns™ and Product Comparison Systems
- Member Application Report System™ (MARS)
- The e-form Engine™ / iPipeline

TECH SHERPA™
- Technology and Efficiency Analysis
- Efficiency and Integration Blueprint
- Document Management Solution
- Roadmap for Growth Project Plan



CASE DESIGN
- Project Janus
- The Life Insurance Design Questionnaire® (LIDQ®)
- Life Insurance Policy Management
- Carrier Snapshots

UNDERWRITING ADVOCACY
- Underwriting Advocacy™
- Quick Quotes
- PURE Medical Solution™
- Pre-Qualification Underwriting Questionnaire™

LIFE SETTLEMENT ADVOCACY
- Life Settlement Filter
- Life Settlement Inquiry
- Life Settlement Engagement Agreement™
- Resource Library

TOLI
- The TOLI Expert Engagement Agreement™
- The Life Insurance Design Questionnaire® (LIDQ®)
- The Life Insurance Policy Management Statement™
- The Comprehensive Market Analysis™
- The Policy Assurance Protocol™

INVESTMENT TOOLS
- Investment Plan Design Questionnaire™
- The Qualified Plan Design Questionnaire™

ADVISORY TOOLS
- The Optimized Portfolio System™ (TOPS)
- The Optimized Portfolio System for 401(k)s™ [TOPS 401(k)]
- VM ACCESS™

ANNUITY TOOLS
- The Variable Annuity Marketing Brochure
- The ValMark Annuity Wizard™
- Peer Annuity Scoring System (PASS™)
- The ValMark Immediate Annuity Quoting System™

PROFESSIONAL PARTNERSHIPS
- The Professional Partnerships Explorer™
- The Professional Partnerships Brochure
- The Professional Partnerships Toolkit
- The Multi-Disciplinary Practice Blueprint™ (MDP Blueprint)

MARKETING MAKEOVER
- Statement of Strategic Advantage
- TOLI Expert System™
- Customized Policy Review System™ (CPR System™)
- Comprehensive Marketing and Business Plan

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