PartnerPro

Experts Making the Sale for You

Maybe positioning life insurance, long term care insurance, disability income insurance, and fixed annuities isn't your focus. At Rohrer & Associates, a proud AssuredPartners company, it's our specialty! Partner with a professional to provide next-level service to your best clients.

Need a product specialist? Too busy? Complex case?

Team selling at it's very best with Rohrer & Associates' PartnerPro.

POWER *through Partnership*

How do I get started?

It's simple. Submit a PartnerPro request and your PartnerPro will do the rest.

What does PartnerPro provide you?

A talented team of point-of-sale, CLU® and CFP® professionals to make the sale. Once the policy is placed in force, you will receive a 50% split of the advisor-level, first-year commissions. Commissions are typically payable by the insurance carrier and advisors must be licensed in the state of sale to receive commissions.

PartnerPro will...

- Contact your client
- Provide solutions
- Make the sale
- Complete the application
- Coordinate underwriting
- Deliver the policy
- Pay commissions

Download PartnerPro Request Form

Submit Online PartnerPro Request

Contact your PartnerPro Team
Phone (763) 424-3521

(763) 424-3521
rbrokers.com

PartnerPro

Submit a PartnerPro Request

ROHRER & ASSOCIATES

Financial Professional and Client Information *(required)*

Advisor Name ______ Best Phone # ______ Email ______

Agent State ______ State of Sale ______ Licensed in State of Sale: ☐ Yes ☐ No

Primary Client Name ______ Gender ______ DOB or Age ______ ☐ Tobacco ☐ Non-Tobacco

Phone # ______ Email ______ Best day to call ______ Best time to call ______

If Applicable:

Secondary Client Name ______ Gender ______ DOB or Age ______ ☐ Tobacco ☐ Non-Tobacco

Life Insurance

Type/Duration: **- Choose from list -** Other *(as applicable)* ______ $______ Insurance Amount

Long Term Care

Product Type: ☐ Individual ☐ Shared Marital Status: ☐ Married ☐ Not Married

$______ Monthly Benefit ______ Benefit Years ______ Inflation Protection OR ☐ Please Help Me Choose

Disability Income Insurance

☐ Personal ☐ Business Overhead Expense (Helps cover business expenses while disabled) ☐ Disability Buy-Out (Funding mechanism for buy-sell agreements)

$______ Monthly Benefit **OR** ☐ Max Available

Employer & Occupation ______ Special Duties ______

$______ Income ☐ W-2 or ☐ 1099 Self-Employed? ☐ Yes ☐ No

Fixed Annuity

Type: ☐ Traditional ☐ Indexed ☐ Help Me Choose Payment Start Date: ☐ Immediate ☐ Deferred

$______ Initial Premium **OR** $______ Income Amount for ______ years

$______ Ongoing Annual Contributions *(Optional)* Qualified Funds? ☐ Yes ☐ No

Payout Options: ☐ Life Only ☐ Life With Refund ☐ Life With Installment Refund ☐ Life With Period Certain ☐ Period Certain Only

Comments: ______

Financial Professional Attestation

1. Submission of this referral form does not waive or amend the terms of my existing producer agreement with Rohrer & Assoc., including but not limited to, any licensing and contracting requirements.
2. I acknowledge that Rohrer & Assoc. may accept or reject the submitted referrral in its sole and absolute discretion. Rohrer & Assoc. shall timely communicate its acceptance or rejection of the referral with me.
3. I acknowledge that if my referral results in a placed and effective insurance policy through Rohrer & Assoc., then I will receive total compensation in the amount of fifty percent (50%) of the placed case commissions payable in accordance with my existing compensation level reflected in Rohrer & Assoc.'s systems on a single-case basis when I am licensed in the state of sale.
4. In consideration of the payable compensation described above, I waive and relinquish any ownership rights concerning the referral, any policy resulting from the referral and/or entitlement to any other compensation concerning the referral to Rohrer & Assoc.

Save and Submit

Email to quotes@rbrokers.com

Questions? Contact Rohrer & Associates at (763)424-3521

Rohrer & Assoc. PartnerPro program is not a means to circumvent any insurance license or carrier appointment requirements. Not all PartnerPro requests will be accepted.

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