



AdviseRight®

A Multi-Carrier Sales Platform for Annuities, Life Insurance & More!

Guiding Your Sales From Start to Finish

- **NEEDS DETERMINATION WIZARD**

This intelligent Fact Finder will help you collect your client's information pertaining to their financial situation, risk tolerance, and goals.

- **PRODUCT SUGGESTIONS**

The system will calculate a suitability score for the products in the system based on the answers gathered during the needs determination. Higher scores represent a better fit for your client.

- **ILLUSTRATIONS**

Run illustrations directly within AdviseRight* to show your client how the top products compare. *illustrations not yet available for all carriers within AdviseRight.

- **ELECTRONIC APPLICATIONS**

Transmit electronic applications directly to the carrier. The e-app will be prepopulated with info collected during the needs determination, saving you time.

AN INSURANCE TECHNOLOGY SOLUTION THAT WORKS FOR YOUR BUSINESS

This game-changing system will simplify and enhance your annuity & life sales, making your presentations smoother, easier to understand, and more professional. Plus, you can be confident that you will always be making the right product recommendation.

AdviseRight will help you stay compliant with the NAIC Best Interest Model. This model was designed to follow the SEC's Reg BI (Regulation Best Interest) and it will require insurance producers who sell annuities to act in the best interest of their clients under the circumstances known at the time of the product recommendation. This requires producers to meet a care, disclosure, conflict of interest and documentation obligation. AdviseRight can help you satisfy these requirements! To comply with these coming regulations, your sales process must be well documented, defensible and thorough. This will be extremely difficult to manage if you are using paper. AdviseRight has been designed to help you comply with these new requirements by thoroughly documenting every step of the sales process - making your sales fully auditable and defensible.

AdviseRight is available now at NO COST, exclusively to the agents and advisors of Western Marketing.

**Give us a call to gain access today.
800.852.7152**

