



**Experienced Case Designers**  
**Personal NEW Business Case Managers**  
**Over 50 Carriers to choose from**  
**Commission up to 140%**  
**Over 40 Years Experience**



#### ABOUT US

##### Mission Statement:

Supporting independent advisors with proven proprietary selling systems creating unlimited sales opportunities.

##### History and Purpose:

Founded in 1968, Sunderland Group (SG) is the ORIGINAL Field Marketing Organization catering exclusively to tens of thousands of independent advisors nationwide. Unlike most marketing organizations, SG is a full-service, standalone, truly self-sufficient company staffed with highly trained and motivated consultants. SG brings to the industry of independent advisors the Best of the Best:

- **BEST Carriers**
- **BEST Commission**
- **BEST Service**
- **BEST Systems**

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newbiz@sunderlandgroup.com  
www.sunderlandgroup.com

## Meet Our Team of Case Managers

### CREATING A SIMPLE MORE EFFICIENT PROCESSING EXPERIENCE.

As part of our goal to continually make operational improvements, we have a team of case managers ready to process your Life Insurance cases. As a producer you are assigned a dedicated Case Manager for all New Business submitted through Sunderland Group.



(Left to Right) Jeremy Bickler, Tara Kegley, Jessica Lovell-Opdahl, Heidi Reed, Steve Trautman

## Meet Our Case Design Team

### EXPERIENCE AND KNOWLEDGE YOU CAN COUNT ON.

Sales support, problem solving, advisor training, sale ideas and more are all roles our Case Design Team members perform everyday with our producers across America. We take pride in giving the right answer right now!



Front Row (Left to Right): Nate Keller, AJ Stafslie, Curt Peterson, Jeremy Bickler, Steve Arntson, Travis Magnuson  
Back Row (Left to Right): Jeff Kolnes, Andy Bakkegard, Chris Korfe, Dean Tong, Cory Clasen, Troy Haman, Rodney Schmitz



Tara Kegley  
Sr Case Manager  
8 years experience  
tkegly@sunderlandgroup.com



Jessica Lovell-Opdahl  
Sr Case Manager  
8 years experience  
jlovell@sunderlandgroup.com



Heidi Reed  
Sr Case Manager  
4 years experience  
hreed@sunderlandgroup.com



Steven Trautman  
Sr Case Manager  
4 years experience  
strautman@sunderlandgroup.com

## New Business Time Standard Expectations

ACTION	TIME EXPECTATION
Applications coded, Meds Ordered and Submitted to HO	All done same business day received.
APS records to be ordered Case Manager	Same day application received if needed based on HO underwriting guidelines, otherwise ordered same day HO notifies us that records are needed.
New Requirements Requested	Notify agent same day requirement is requested from HO.
Holding an application with \$\$\$	Return to agent if requirements not received within 5 business days from the date of receipt.
Holding an application with NO \$\$\$	Return to agent if requirements not received within 10 business days from the date of receipt.
Underwriting/Delivery requirements received	Satisfy in system and forward to HO same business day received.
Application approvals/rating	Notify agent the day Case Manager is notified of the approval.
Application declines	Notify agent the day Case Manager is notified of decline.
Follow-ups	Completed within 48 hours of follow up date - cases are followed up on every 5-7 business days or sooner when requirements are newly posted.
Quick quote requests	Submitted to HO within 24 hours of request. Upon receipt from HO notify agent same day received.
Respond to phone calls	Give immediate response if possible – if research needed respond within 24 hours.
Respond to email or voice mail messages	If before 3pm, respond same day otherwise within 24 hours of receiving message – if still researching, respond to acknowledge receipt of email/voice mail and advise status.
Policies received at SG	Mailed out to the agent/upline day same received via Priority Mail.
Inforce policy service requests	Submitted to HO within 48 hours of receipt.

# Sunderland Group means business!



“ In addition to working with individual agents and brokers, we also work with marketing and brokerage organizations who like having access to our companies and technology platforms. We will provide you with sales support, new business processing, management technology, and compensation. ”

-Brad D. Sunderland, President, Sunderland Group

## Over 50 Carriers

TO CHOOSE FROM

- **LICENSING:** Our experienced Licensing Team processes producer appointment forms and can recommend carrier(s) that are best suited for you and your client's needs and goals.
- **CASE DESIGN:** We provide life solutions from Super Preferred to Super Impaired. We also provide life solutions for kitchen table sales to the most advanced estate and business planning concepts, which are either financed by traditional payment methods or premium financed.
- **QUOTES:** Our staff is comprised of some of the brightest and most experienced individuals in the industry. Call your Life Case Design Team to discuss your next case.
- **FORMS:** Visit [www.sunderlandgroup.com](http://www.sunderlandgroup.com) to access required carrier new business applications and forms to accurately submit your business.
- **CASE MANAGEMENT:** Submit your Life applications directly to Sunderland Group. We are responsible for scrubbing applications, ordering Paramed/APS, working with the underwriters while keeping the producer in the know along the way.
- **WEBINARS:** We conduct and administer our own webinars providing thorough, yet quickly delivered information you can apply immediately. Each session is designed to help you gain sales ideas and discover new opportunities to help grow and build your practice.
- **MARKETING EXPENSE REIMBURSEMENT ALLOWANCE (M.E.R.A.):** Higher volume producers are rewarded with Sunderland Group's M.E.R.A Program. M.E.R.A. is the richest producer compensation program in the industry.



## Policy Delivery Tips

TO GET PAID FASTER

- **DELIVERY REQUIREMENTS**  
ALL requirements MUST be returned dated and contain signatures of all parties: insured, owner, agent and witness.
- **ILLUSTRATIONS**  
If an illustration is part of the delivery requirements, ALL PAGES of illustration MUST be returned with proper signatures and dates.
- **PREMIUM MODE CHANGES**  
Modal factors MUST be used when calculating new premium. Monthly premium requirements: Collect a minimum of 2 months premium, a pre-authorized check (PAC) form and a void check.
- **FORM OF PAYMENT**  
Please contact New Business before collecting and submitting monies other than personal checks.

“ I cannot tell you how amazed I was to find out just how much money we were losing with our former brokerage firm. We thought we had one of the best deals in the industry, WOW were we wrong. We are sure glad we made the switch. ”

-Victor, Texas



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