



# HIDDEN GEM

THE NEWSLETTER FOR GEM STATE FINANCIAL GROUP



Page 3

## NEW BROKERAGE ARM

Gem State Financial Group has partnered with Creative One to be able to offer you additional companies for your clients that may not have found a home with Ameritas. We also now offer options for Final Expense plans.

Page 4

## GEM STATE WEBSITE:

Have you checked out the Updated Gem State Financial Group website yet? We have plenty of tools on the website to assist you.

Pages 5

## 2018 NAIFA IDAHO STATE CONVENTION

The State NAIFA Convention is coming up next month. Ameritas will be sponsoring a booth. Come by and say "Hi!"

### Agency Trainings

May 7<sup>th</sup> - Scott Leavitt, General Agent

May 21<sup>st</sup> - Nick Jasa, Ameritas Field Sales Director

To join agency trainings:  
<https://global.gotomeeting.com/join/9527349>

Phone: 1 (646) 749-3112

Access Code: 952-783-349

## Scott's Thought:

Thanks everyone who attended our meetings on April 19<sup>th</sup>! I hope you enjoyed meeting Wendell Stallings from the Ameritas Home Office and David Richert the Ameritas RVP. We look forward to being able to offer meetings like this to you in the future!

Remember May is Disability Insurance Month!



### CURRENT SALES CONTEST STANDINGS

1<sup>ST</sup> Place- Tracy Boster (Qualified)

2<sup>nd</sup> Place- Michael Bouton

3<sup>rd</sup> Place- Stephen Smith

How to earn points:

1 point for each submitted unbound Life or Disability policy

OR 2 points for each submitted bound Life or Disability policy

1 point for every \$500 in submitted FYC

1 point for every paid Life or Disability policy

1 point for every \$500 in paid FYC

\*Ameritas Life and Disability Production Only

### WE'RE ON SOCIAL MEDIA!

Did you know Gem State Financial Group is now on LinkedIn and Facebook? Click on the logos bellow to follow us for content you can share with clients and for upcoming events.



“More than 51 Million working adults in the U.S. are without disability insurance other than the basic coverage available through social security.”

(Source: American Council of Life Insurers)

## NEED HELP?

CONTACT US:

**Scott Leavitt, General Agent**

Phone: (208) 850-7003

Email: [scott.leavitt@gemstatefg.com](mailto:scott.leavitt@gemstatefg.com)

**Preston Leavitt, Assistant to GA**

Phone: (208) 891-6901

Email: [preston.leavitt@gemstatefg.com](mailto:preston.leavitt@gemstatefg.com)

**Jon Geier, Ameritas Internal Wholesaler**

Phone: (402) 465-6128

Email: [jgeier@ameritas.com](mailto:jgeier@ameritas.com)

**Congrats to the Following Members that wrote their first cases with us last month:**

Jenna Ortiz

Roscoe Orton

Venice Fairbanks



## ***BROKERAGE***

Gem State Financial Group is pleased to announce that we have partnered with Creative One to offer you additional companies to help service your clients. We now have access to over 35 additional companies to write Life Insurance and Annuity business.

If you now have business that we need to write outside of Ameritas we will be able to work with you to find the right carrier that will accept the business. If you have an impaired risk case, No Problem. We will be able to work with the in-house concierge team to find the best Underwriting outcome for your client.

**Our Brokerage Arm allows us to write with all of the following companies and more:**



Gem State Financial Group has also partnered with American Memorial Life and Great Western Insurance Company to offer Final Expense coverage. For those truly in need of Final Expense coverage you can now write Level and Graded Death Benefit options. We also now have a TRUE Guaranteed Issue Final Expense plan with no health questions. Face Amounts can be written for as low as \$5,000.

[AMERICAN MEMORIAL LIFE  
QUOTING SOFTWARE](#)

[GREAT WESTERN INSURANCE  
COMPANY QUOTING SOFTWARE](#)



Call now to find out how we can work together-[208-377-1428](tel:208-377-1428)

"PROTECTING FAMILIES, BUSINESSES, AND THEIR INCOME"

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**Upcoming Events:**

"Keeping Your Business Alive" Free Event April 19th 2018 6:00-7:00 pm Center At The Park



**Stat of the Month**

"In 2016, of the U.S. Population with Disabilities over half (51%) were in the working ages of 18-64 while 41.4% were 65 and older"

(Source: 2017 Disability Statistics Annual Report)



**LET GEM STATE FINANCIAL GROUP HELP PROTECT YOUR FUTURE!**

**WELCOME**



Our agency is here to help you and your business. From protecting yourself, your family, or your business we will provide you with a custom package that fits all of your needs..

**PROTECTION**



As an independent agency, we represent several top rated insurance companies that will meet your personal or business needs. Feel free to give us a call today for your free analysis.

**RETIREMENT**



There are a many tools we can use to assist you in achieving your retirement goals and help you ensure that you don't outlive your money! People dont plan to fail, they fail to plan!

**INSURANCE SERVICES**

**Life**  
We'll help you uncover your needs and provide you with a customized solution to solve those needs!

**Individuals & Families**  
We'll assist you with the ways to protect you and your family with proper insurance planning!

**Business**  
We'll help your business with employee benefits, retain your key employees and help with business transition planning!

**Disability**  
How important is your income? . We can help you develop a plan to protect one of your most valuable assets!

**Proud Members Of:**



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# 2018 NAIFA Idaho State Convention

Sunday-Wednesday, June 17-20, 2018 - Courtyard Marriott - Meridian, ID

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Thanks to our 2017 Sponsors!



## Keynote Speakers



### **Eszylfie Taylor** // Taylor Insurance & Financial Services

Eszylfie Taylor is the president and founder of Taylor Insurance and Financial Services located in the financial district of Pasadena, California, and serves as financial advisor to individuals, business owners, and high net worth families.

Mr. Taylor has been recognized as an accomplished insurance producer in the industry, receiving the National Association of Insurance and Financial Advisors (NAIFA), "Agent of the Year award: Los Angeles" in 2010 - 2012. Additionally, Mr. Taylor is a life and qualifying member of "Million Dollar Round Table," and has been a Top of the Table producer since 2011, ranking him in the top 1% of all producers, worldwide. Most recently, he was selected to win NAIFA's Top 4 Under 40 Advisors award for 2015. [FULL BIO HERE >>](#)

Sponsored by:



### **Tom Ziglar** // Ziglar, Inc.

Tom Ziglar has had the rare privilege of spending his entire life surrounded by world-class leaders, innovators, and motivators. Family dinner included the presence of the world's TOP motivator, his father, Zig Ziglar. As a result, Tom's arsenal of experience and information is absolutely unparalleled. As CEO of Ziglar, Inc., Tom Ziglar carries on the Ziglar philosophy: "You can have everything in life you want if you will just help enough other people get what they want."

Tom Ziglar was a key collaborator with his father on Zig Ziglar's 30th book, *Born to Win*. The *Born to Win* philosophy is both "profoundly simple" and "simply profound." You must plan to win and prepare to win, then and ONLY then can you expect to win! Tom's greatest business triumphs are the result of bringing people to this elementary realization: "You are Born To Win, so go ahead and Live To Win: You can have a life of Success and Significance and you can leave a Legacy that will ripple through eternity."

Tom speaks around the world to billion-dollar companies, small business owners, and prestigious academic institutions, including Cambridge and Harvard. Leadership, business, and performance are among Tom's favored topics.

His unique education, life experience, and innate gifts perfectly position Tom to serve top executives. His ability to hone in on the crux of a business issue and provide premium-level coaching allows his clients to take their business further than they ever dreamed possible.

The Ziglar brand is more relevant today than ever. Ziglar has exceeded four million likes on Facebook and The Ziglar Show has become one of the top-ranked business podcasts. The world is hungry for inspiration, motivation, and hope. With Tom's innovation, Ziglar has become the go-to resource! [MORE ABOUT TOM ZIGLAR >>](#)



# Spring Contest

Contest will run from March 1, 2018- May 31, 2018



**Grand Prize:** iPad Mini 4

**Runner Up:** \$100 Visa Gift Card

**Participation Prize (15 Points):** \$50 Visa Gift Card

**How to earn points:**

- 1 point for each submitted unbound Life or Disability policy or
- 2 points for each submitted bound life or Disability policy
- 1 point for every \$500 in submitted FYC
- 1 point for every paid Life or Disability policy
- 1 point for every \$500 in paid FYC

**How to win: You must earn 15 points to qualify for a prize**

**\*Ameritas Life & Disability Business only**



**Gem State  
Financial Group**

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Gem State Financial Group is offering an opportunity for **ALL CONTRACTED AGENTS/BROKERS** to help us grow the agency. Your recommendation of a new Career or Independent Agent to Gem State Financial Group can grow **YOUR** income. \*When that referral becomes part of the Gem State Financial Group Team you will receive 10% of their **Ameritas Life** {Life and DI only} FYC production for as long as they write business. Refer a producer, work with him/her, split business with him/her and earn dollars while we all benefit to make this the biggest and **best** firm in the Company.

Please complete the following and return to Scott Leavitt; General Agent

\*Referring Agent must maintain a contract (specified by Ameritas) to continue qualifying for bonus.

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Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Best Time to Call: \_\_\_\_\_

Agent/Broker Name: \_\_\_\_\_ Date: \_\_\_\_\_