



**BERSON-SOKOL AGENCY, INC**

*Our business is helping yours*

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## PROFORMEX CASE STUDY

# Identifying 2 Term Conversion Cases for \$28k in Premium with Proformex



### THE CHALLENGE

Berson-Sokol Agency, LLC works diligently to ensure their agents and advisors have access to the best tools and resources available to empower them to manage and maximize their business. Historically, when it came to life insurance, there weren't many solutions custom-built to support post-sale efforts to keep policies in good standing relative to ongoing and changing client circumstances.



### THE SOLUTION

The Berson-Sokol team discovered Proformex's life insurance engagement and servicing platform and saw it would fit their need for a solution to help their agents and advisors better monitor and monetize their life insurance business. Now that they've come on board with Proformex, they have a personalized view of their business at scale and can leverage alerts for important time-sensitive information – like upcoming term conversion end dates, premium due date reminders, policy anniversaries, and more.



## THE RESULT

Thanks to the new Proformex home dashboard that aggregates and prioritizes the most actionable and tailored information about your business in one place, the Berson-Sokol team was alerted to two upcoming term conversion milestones that resulted in the placement of two new policies and \$28k in additional premium. This was a win across the board: Berson-Sokol got to further demonstrate their value as a partner to their agent, the agent strengthened their relationship with the client by being proactive and making sure their coverage met their needs, and the client can now enjoy peace of mind knowing they're covered appropriately.

“This is exactly the kind of value-added service we’re proud to offer our agents and advisors,” said Craig Berson, LUTC, CLTC, President of Berson-Sokol. “Proformex makes it easy for us to ensure we never miss an opportunity to turn policy-specific information into a positive client outcome.”

## About Berson-Sokol Agency, LLC

Ever since its founding in 1973, Berson-Sokol has been dedicated to two kinds of excellence: the service they give their agents and the products they make available to clients. That may seem fundamental, but they have found this streamlined, highly focused approach to be a winning formula, year after year, for all concerned. Their agents value their responsive follow-through, as well as the attractive products they can offer the individuals, families, and companies with whom they work.

Of course, “keeping it simple” does not mean they have not changed. Actually, their agency has made dramatic advances to maintain service and product excellence. They’ve invested in state-of-the-art technology to bolster agents’ sales and marketing capabilities, to make the issuance of each policy quicker and more efficient, and to speed information delivery. As the insurance business has grown more competitive and complex, they’ve researched and added many products to help agents stay in the forefront of the industry.

## About Proformex

Proformex is a data and technology platform purpose-built for financial professionals and institutions to manage life insurance and annuity assets. With deep data and technology expertise, Proformex connects customers to critical information about their life insurance and annuity businesses and helps them make better informed, data-driven decisions. With Proformex, financial professionals have the technology tools needed to proactively manage life insurance and annuities and enhance value for their clients.