



STATEMENT OF INSURANCE POLICY
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FINANCIAL SERVICES

Solution Overview



We understand that your success depends on results, from new client acquisition to customer retention. Our expertise in the Financial Services industry is built on performance, where our skilled Customer Service Representatives (CSRs) are a true reflection of your company due to their professionalism and knowledge. **Let us show you how.**

**FINANCIAL SERVICES
CALL CENTER EXPERTISE**

- INSURANCE
- REAL ESTATE
- MORTGAGE
- DEBT RELIEF
- RETIREMENT

More Than A Call Center

MANAGE YOUR TIME

Focus on your core competency by having us handle multiple aspects of lead generation, qualification, transfers and appointment scheduling.

PRIORITIZE YOUR CALLS

We take care of which calls you prefer to immediately handle, leave a message, or transfer to another line based on your needs.

Our proprietary reservation service solution, **Seminar Edge**, provides immediate appointment visibility through seminar and reservation seating to increase your financial service solution exposure.

Need to take control of your contacts by knowing who is calling and why? With our customized call reports, you will be able to effectively prioritize your calls based on your schedule!



LEAD GENERATION

TeleDirect works with various Financial Planners and Consultants to help with Lead Generation efforts, powered by our targeted solutions utilizing Dedicated Agents.



LEAD QUALIFICATION

With your qualification requirements in place, we can transfer your qualified leads to enable you to easily turn a prospect into a client.



YOUR FINANCIAL SERVICES CALL EXPERTS ARE READY TO HELP YOU TODAY!

800-776-1081

Your Services. Our Solutions.

INCREASING YOUR ROI IS OUR TOP PRIORITY.

Inbound Calls: We handle financial calls on your behalf by being an extension of your business. Through detailed segmentation of incoming leads completed by our advanced scripting tool with logic-based options, our CSRs properly identify the callers' needs and proceed to document information to guide them through the lead funnel. Client acquisition is accomplished through successful caller engagement.

Outbound Calls: Our Dedicated Representatives are a tremendous resource for lead generation efforts, as well as providing appointment reminders, follow-up on status requests and completing surveys. Additionally, online request for information forms completed by prospects can immediately trigger notifications to our team to ensure an immediate response, separating yourself from your competition.

Flexible solutions for Financial Services

DEDICATED AGENTS

Our Dedicated Agents only work on your account and become a true extension of your in-house team due to:

- 1) Specialized Training
- 2) Account Proficiency
- 3) Performance Reviews
- 4) Management Oversight

Our team can scale up based on performance or volume at your request to maximize your ROI. Our Dedicated Agent model has proven success in the Financial Services industry with our various clients.

BLENDED AGENTS

Our Blended Agents work on multiple accounts and are highly efficient, ensuring your goals are attained in a cost-effective manner due to:

- 1) 24/7 Availability
- 2) Overflow Call Handling
- 3) Initial Point of Contact
- 4) Performance Reviews

Our 400+ team of Blended Agents across three (3) locations utilize

the same script to provide consistency and standardization, ensuring caller interactions and results do not deviate depending on location. A combination solution of Dedicated and Blended Agents are frequently utilized by our clients.



REGULATIONS

As your industry experts, we understand the requirements of Licensed Agent interaction throughout the lead conversion process. Our qualification process assures you and your team of Licensed Agents speak to the lead immediately.



CALL TRANSFERS

You will be able to select which days and between which hours you want us to transfer calls. Outside of those hours, we will take a message and send it to the email or text it to the phone you provide for each Call Reason.

Data Analysis & Reporting

ROBUST REPORTING TO TRACK PERFORMANCE & KPI'S



Our on demand reports give you immediate access and instant visibility.



Analyze your call trends to ensure your Lead Generation efforts are effective.

Cost effective solutions at the right price

AGENT MODEL OPTIONS

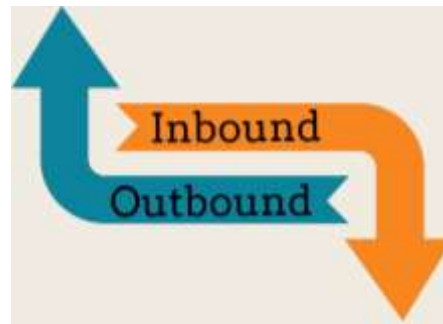
Based on your anticipated call volume, training needs, anticipated launch date and required agent skill set, our Dedicated and/or Blended workforce solutions are ready to deploy.

A thorough needs analysis will be completed by our Business Consultant to ensure the correct solution(s) can be identified.

Visit <http://www.teledirect.com> for more information today!

ADDITIONAL OPTIONS

In addition to our workforce solutions, we also offer a variety of extra services which can help you reach your business goals even faster. Take a look at what we have to offer:



- 1) Call Recordings
- 2) API Integration
- 3) Text Messaging

You can decide which additional options would be beneficial at any

time. With complete control of your communication needs, TeleDirect provides the solutions to make your business run as efficiently as possible.



Which Workforce Model should I choose?

You should select the Workforce Model that best matches your expected volume and required needs. Meaning, the number of minutes anticipated per month and the required skill set to complete your calls.



Can I change my Workforce Model at any time?

Dedicated Agents require a timeframe commitment, but we can scale the amount of Blended CSRs due to our staffing and availability.