

The Lansare Report



Our Research Tools Tap Into a Steady Source of Leads

Life events, policy events and changes in the client relationship are untapped sales opportunities! The Lansare Report is a simple, yet powerful way to generate sales and service opportunities for your financial advisors. Using the Lansare on-demand platform, you can easily monitor activity in your book, and provide advisors with a reason to reach out to clients.

Monitor Life Events, Policy Events and Transaction Activity

- Address changes
- Beneficiary changes
- Birth dates
- Age-driven decision points
- Policy anniversary dates
- Rider maturities
- Out-of-surrender dates
- Changes in systematic deposits or withdrawals
- Changes in sub-account allocations
- Large transactions
- Customized rules and alerts to meet your exact needs

Learn More

Visit us at www.lansare.com
or call us toll-free at
1-877-204-0148

About Lansare

Since 1997, Lansare has been delivering research, analysis and reporting solutions to the financial services industry. We specialize in life and annuity data, enabling our clients to effectively manage their life and annuity business. Our focus and technology expertise enable us to deliver reliable, cost-effective solutions that quickly generate ROI for our clients.

The Lansare Report is delivered electronically on a daily, weekly, or monthly basis depending on your needs. It is also available via a secure website, so advisors have access to their opportunities anytime, anywhere.

Sample Report

					
My Clients – Last 30 Days					
Client Name	Email	Primary Phone	Event	Date	
Andrew Grady	Andrew.J.Grady@aol.com	914-803-1195	New Premium	Feb 11, 2009	
Timothy Bradley	Timothy.K.Bradley@msn.com	785-299-5924	Address Change	Feb 03, 2009	
Steven Shaver	Steven.B.Shaver@rr.com	760-477-7380	Large Transaction	Jan 26, 2009	
My Clients – Next 30 Days					
Client Name	Email	Primary Phone	Event	Date	
Karen Miller	Karen.R.Miller@yahoo.com	904-448-9604	Policy Out-of-Surrender	Feb 27, 2000	
Lenora McFarland	Lenora.R.Mcfarland@msn.com	217-273-3618	Premium Out-of-Surrender	Mar 1, 2009	
Josephine George	Josephine.J.George@yahoo.com	256-716-9952	Policy Anniversary	Mar 5, 2009	
Glenn Tice	Glenn.R.Tice@msn.com	870-408-9864	71 Birthday	Mar 15, 2009	
Claire Johnson	Claire.T.Johnson@msn.com	239-691-0962	Rider Maturity	Mar 26, 2009	

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