

# THE PARTNERSHIP ADVANTAGE:

*Fueling your Drive for Accelerated Growth*



SENIOR MARKET  
**ADVISORS**

## LEADING THE PACK

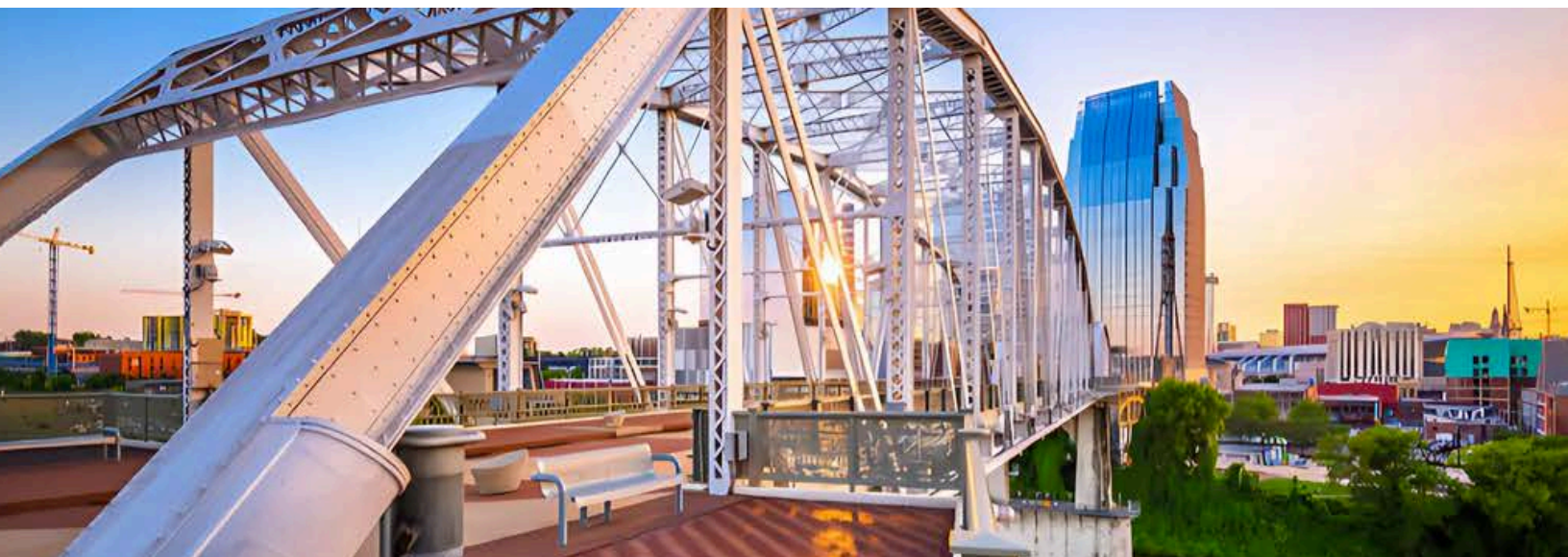
*Since 2007, Senior Market Advisors has been investing in people and fueling the growth of our partners.*

Our success comes from building lasting relationships and supporting businesses that elevate our industry. By focusing on our partners' success, we've earned recognition as the top agent-built FMO.

## WIN WITH US

Our team, led by our CEO, Josh Borders, is ready for a new growth phase. Prior to becoming our CEO, Josh was a competitor, a downline agency, and an acquired Partner Affiliate of SMA. These factors along with the core team of leaders he has put together allows SMA a unique perspective and resources to accelerate the growth of our partners and SMA.

*We're looking for partners that are interested in growing with us. By partnering with SMA, you'll gain access to one of the leading distribution agencies in the industry.*



# WHY CHOOSE SENIOR MARKETING ADVISORS?

SMA was built by agents, for agents. We put in many years as health insurance agents, learning the ins and outs of the business from the producer perspective. We are now fully dedicated to fueling the growth of others.

We're not a direct-to-consumer shop, or in the business of selling insurance. We are a marketing organization designed to be the engine that helps you get where you want to go faster. We're here to enable your success.

SMA is a top producer with AmeriLife, one of the leading marketing and distribution organizations in the nation. We consistently distribute our growth and have had great success across the Big 6 to mitigate risk in this ever-changing environment. Year over year, we continue to be the #1 FMO with Elevance Health. In addition to those listed, we also partner with a wide range of local and regional carriers to give you even more options.



*We're always searching out opportunities for new partnerships with groups we anticipate growing exponentially over the next several years. Get in on the ground floor with us as we build new relationships and blaze a new trail forward.*

# PARTNERSHIP PATHWAYS

*SMA is here to fuel your drive, and to help you navigate your way to increased sales and growth — but you choose the path our partnership will take.*

PATH ONE

## **Partner Acquisition**

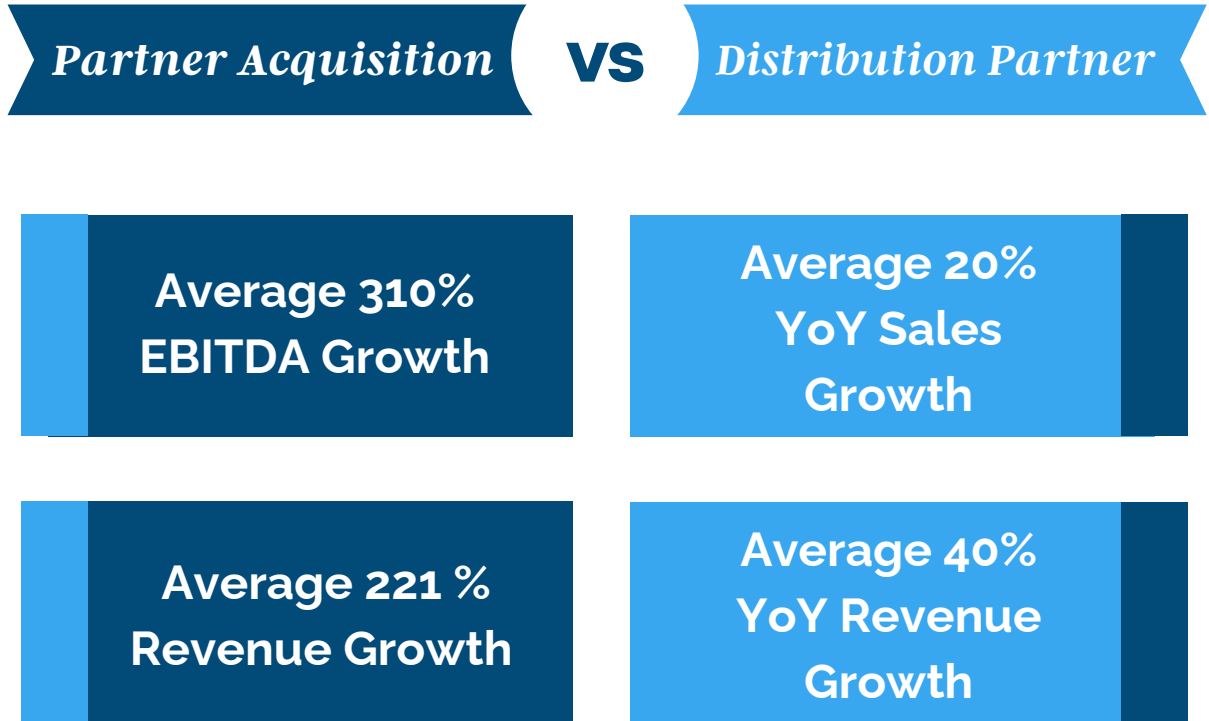
- M&A opportunity
- Acquisition structures at 51/49% (up to 75/25%) 3-5 year acquisition strategy
- Maintain agency brand and oversight
- SMA fully invested in your long-term growth with full back-office support
- Dedicated Account Management team
- Quarterly bonus earn-outs
- Top Level Contracts & Marketing Deals

PATH TWO

## **Distribution Partner**

- Contract with SMA based on production opportunity
- Maintain full ownership
- Partner with SMA team to develop strategy and leverage carrier relationships and marketing support
- Let us help you grow big enough to go direct with carriers just like SMA
- Dedicated Account Management team
- Remain eligible for SMA Options Program for future acquisition

# PARTNERSHIP OUTCOMES



***Choosing either path amplifies our ability to boost your performance.***

Having a few contracts with us is a great step toward building your business. But by having all your contracts under us, we're better able to support you and funnel new opportunities to your agency.

By having a holistic view of your business, we can understand your agency's unique needs, so we can provide more personalized and effective support, as well as identify cross-selling opportunities and help you expand your service offerings.

## MORE ABOUT US

You and your organization are on a journey to grow and achieve success, and the road to success can be daunting. At Senior Market Advisors, we truly understand what you're going through—because we've been there ourselves.

We started out just like you – selling insurance in 2007 as a captive health insurance agency based in Nashville, TN. We know firsthand the struggles of building and scaling an insurance agency. We have learned how to overcome these obstacles, and dedicated ourselves to helping other businesses do the same.

### *We believe your success is our success.*

What makes SMA different is our commitment to sharing our growth and success directly with our partners. We can provide you with direct support and reduce the time it will take to scale and grow a sustainable insurance agency.

***On our mission,  
we're guided by our  
three key principles:***



***Transparency***



***Communication***



***Partnership***

# GET TO KNOW OUR TEAM



***Josh Borders***

CEO



***Tiffany Porter***

EVP, Business  
Development



***Andy Watkins***

EVP, Distribution



***Vinny Cardi***

EVP, Finance, M&A



***Whitney McQueen***

Senior Director,  
Commissions &  
Contracting



***Drew Gurley***

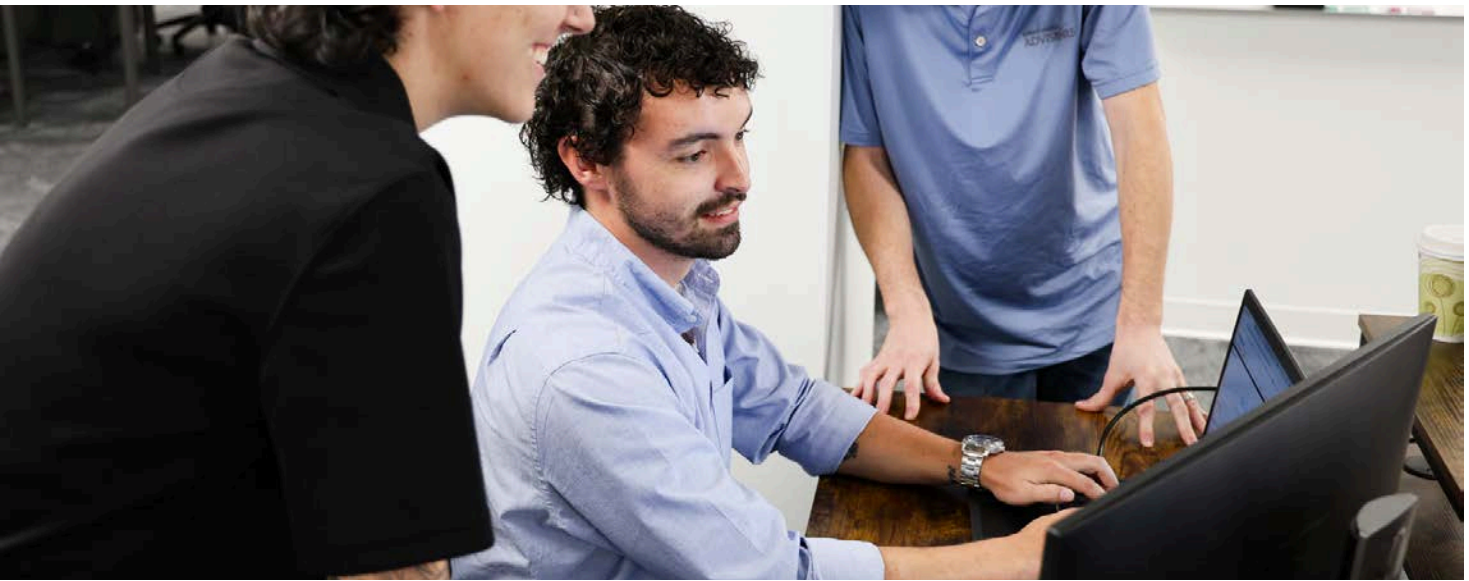
EVP, Growth



***Cassie Smith***

EVP, Sales

# OUR SERVICES



## ***Expansion & Recruitment Efforts***

Helping our partners grow through enhanced recruitment campaigns, where agent leads are distributed directly to you without the costly B2B marketing expenses.

## ***Operational Support***

To boost the productivity of our affiliates, our operations team efficiently manages all commissions and contracting processes. Our team is also here to support with any compliance or data reporting needs you may have so you can focus on your core strength - selling.

## ***Top-notch Tools & Resources***

Our resources have given our partners the flexibility and access to national resources and capabilities they're looking for, including an agent CRM and an easy enrollment platform, live webinars and a library of world-class training materials.

## ***Strategic Relationships***

With our national & regional strategic relationships and top contracts, we are able to provide exclusive opportunities and partnerships that takes your business to the next level.

## ***Dedicated Account Management Team***

The combined product and market knowledge of our Account Management team along with their relationship first mentality differentiates us from our competitors in the space.

## ***Growth Opportunities***

Let us be the growth engine that propels your business forward through our shared expertise, market reach, and market-disrupting solutions!



# YOU'RE IN THE DRIVER'S SEAT

We want to be the engine that powers your growth goals, but the direction we go is ultimately up to you! Once you know your desired destination, we're dedicated to helping you get there in style.

*Which path will you choose?*



*Get in touch with us today to get your journey started!*

**Drew Gurley, EVP of Growth**

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