

Providence Partners & Providence Benefits

Scale Your Infrastructure. Amplify Your Brand. Maintain Your Independence.

As a solo practitioner, your time is your most valuable asset—and your greatest constraint. Behind the scenes, managing operations, customer service, and claims administrative loops pulls you away from revenue-generating client relationships.

THE SERVICE MODEL: YOUR INSTITUTIONAL BACK OFFICE

Our affiliation model allows independent professionals to instantly leverage a deeply staffed agency ecosystem, appearing larger than they actually are to clients and prospects while keeping overhead low:

- **Enterprise-Grade Customer Service:** Dedicated back-office support handling client inquiries, policy service requests, and operational administration with corporate precision.
- **Expert Benefits & Claims Advocacy:** Direct advocacy and resolution management of complex insurance or employee benefit claims under the robust Providence platform.
- **Advanced Case Design & Underwriting:** Gain immediate access to sophisticated product architecture, expert design support, and deep carrier leverage for large-case underwriting.

MARKET POSITIONING COMPARISON

THE SOLO PRACTITIONER ALONE

- Strictly limited by personal time and processing capacity.
- Frequently bogged down in administrative loops and claims resolutions.
- Perceived by larger corporate accounts as a single-point-of-failure risk.
- Forced to compete against heavily resourced regional brokerages.

THE PROVIDENCE-AFFILIATED ADVISOR

- Scalable throughput driven by an operational back office.
- Liberated to focus entirely on high-value client production and advice.
- Backed by a multi-disciplinary institutional network.
- Promoted dynamically on a cross-regional corporate web asset.



www.providencepartners.org



www.providencebenefits.com

AFFILIATION TIERS & PLATFORM ACCESS

PROVIDENCE GOLD

Designed for baseline independent growth

Open Affiliation Model

- **Brand Autonomy:** Maintain complete independent affiliation under your own brand identity.
- **Top-Tier Payouts:** Retain highly competitive, top street-level compensation structure.
- **Expert Infrastructure:** Direct access to dedicated Providence case specialists and advanced design.
- **Case Management:** Comprehensive end-to-end new business tracking and specialized pipeline administration.
- **Intellectual Capital:** Continuous weekly email distribution of proprietary marketing ideas and strategy briefs.
- **Sales Support:** Professional new business cover letters structured on your behalf as needed.
- **Joint Work:** Case-by-case consultative sales split arrangements available for high-complexity clients as needed.
- **Network Events:** Invitations to hosted educational events and annual production-based appreciation gatherings.

PROVIDENCE PLATINUM

Premium scaling for high-producing solo offices

\$800/yr (\$200/qtr or \$50k Life Target / \$1M Annuity)

- **All Gold Benefits Included:** Full access to the foundational core platform, pipeline tracking, and events.
- **Digital Authority:** Dedicated Agent/Advisor profile bio featured directly on Providence public websites (if needed).
- **Corporate Identity:** Specialized Providence corporate email account configuration (if needed).
- **Custom Branding:** Full design modification of any Providence marketing assets customized specifically for your brand or the Providence brand.
- **Media Asset Creation:** An annual professional headshot session managed and funded for your marketing use.
- **Meeting Architecture:** Tailored, customized prospect and client agendas for key annual reviews or new business sessions.
- **Print Collateral:** 200 high-quality, customized Providence One-Pager (or agent brand) slicks for leave-behind marketing.
- **Digital Marketing:** Regular supply of compliance-friendly social media content ready for posting.
- **Annual Appreciation Gift:** Curated choice of golf gear, dinner gift card, premium bourbon, or wine appreciation gift each year.

THE MUTUAL GROWTH FRAMEWORK

WHAT YOU RETAIN

- **Absolute Independence:** Complete ownership of your book of business and firm style.
- **Primary Client Control:** You remain the exclusive face of the relationship.

WHAT YOU COMMIT

- **Platform Placement:** Route your insurance and benefits placement through Providence platforms.
- **Strategic Alignment:** Partner on web visibility to enhance mutual market distribution.

ACCELERATE YOUR PRACTICE

Let us handle the infrastructure while you dictate the vision. To select your tier or preview our platform tracking, contact the Providence Team.