



CASE STUDY

Levinson & Associates

IronClad Family Helps
Insurance Marketing
Organization Offer
Greater Value to Agents



LIFE & ANNUITY IMO SINCE 1972
www.levinsonandassociates.com

The Challenge

In a highly commoditized industry with regulated pricing, it can be difficult for independent insurance agents to differentiate their offering from the competition.

Many independent agents turn to Insurance Marketing Organizations (IMOs) like Levinson & Associates for ways to set themselves apart in the independent insurance market. This IMO services over 20,000 new and existing agents, representing a portfolio of more than 75 life carriers and 25 annuity companies.

But even with its broad nationwide reach and commitment to technology, Levinson & Associates still faces the challenge of creating or sourcing the most cutting-edge tools to help its network of agents acquire new clients and grow their businesses.

The Solution

IronClad Family, a cloud-based legacy asset planning platform, helps insurance agents differentiate by enabling them to offer clients an end-to-end solution that organizes, secures and ultimately delivers their most important legacy information.

In 2018, Securian Financial, one of Levinson & Associates' carriers, honored IronClad Family for "innovation shaping the future of financial services and life insurance through technology."

Upon learning about the recognition, Levinson & Associates wanted to find out more.

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That to me is huge. It's priceless," said Bill Levinson, Managing Partner at Levinson & Associates. "We know how many layers of compliance these carriers have. When a carrier takes notice like that, we have to dive further in."

In IronClad Family, Levinson saw a disruptive platform that would create remarkable potential for agent differentiation, client engagement and business growth.

In 2019, IronClad Family and Levinson & Associates formed a powerful alliance. Agents who work with the IMO can access IronClad Family at a discounted rate and provide the valuable legacy asset planning service to their clients free of charge.

Partnering With IronClad Family



Levinson & Associates offers IronClad Family to agents at a discounted rate.



Insurance agents provide IronClad Family free of charge to clients.



Agents increase client engagement and lead flow opportunities.

The Results

IronClad Family has complemented Levinson & Associates' commitment to providing agents with the tools they need to delight their clients by delivering truly world-class service.

“

This partnership will help make the agent a true trusted partner for their clients and strengthen the agent-client relationship in a way that no other company can,” said Levinson.

IronClad Family has a proven track record of helping agents. Across both the insurance and financial services industries, using IronClad Family increases business close rate by 35% for agents and advisors. Plus, agents and advisors who offer the IronClad Family platform see an average of 2.5 times more website visits and five times more leads.

IronClad Family and Levinson & Associates continue to work together to help insurance agents differentiate their value proposition and grow their businesses.



IronClad Family's Impact on Insurance Agents and Financial Advisors

35%

higher
close rate

2.5x

more website
visits on average

5x

more leads
on average



Differentiate Your Business With IronClad Family

Speak with us to learn more about how end-to-end legacy asset planning can help you improve client relationships, close new business and set yourself apart.

[Schedule My Consultation](#)



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