

Strategic alliance individual   
marketing campaign

Use this step-by-step campaign to help market your solutions to a strategic alliance’s individual clients.

1. Reach out to middle and moderate net worth clients.

Send out an email introducing the dedicated staff person who’ll be providing these additional financial solutions.

Resources:

* **Individual Approach Email (LF336)**   
  Note: You can edit all email files to include the strategic alliance’s logo and customize the next steps/call to action. Don’t suggest in the email that you’ll follow up with a phone call unless you plan to at this stage.  
  [View](https://advisors.principal.com/publicvsupply/GetFile?fm=LF336&ty=OFT&EXT=.OFT) (OFT)
* **Client Priorities Checklist (BB10775)**  
  You may want to attach or link to this checklist in the email above so the client has more information about your offering.  
  [View](https://advisors.principal.com/publicvsupply/GetFile?fm=BB10775&ty=VOP&EXT=.VOP) (PDF)

1. Follow up with middle net worth clients.   
   Topic: Life insurance review

Send an email and/or direct mail to this group about a life insurance review.

Resources:

* **Life Insurance Review Approach Email (LF496)**   
  [View](https://advisors.principal.com/publicvsupply/GetFile?fm=LF496&ty=OFT&EXT=.OFT) (OFT)
* **Consumer Guide to Life Insurance (BB9135)**

Consider attaching or linking to this guide in the email above to help clients better understand their life insurance needs.

[View](https://advisors.principal.com/publicvsupply/GetFile?fm=BB9135&ty=VOP) (PDF)

* **Annual Review Checklist Letter (BB10010)**

This letter accompanies the Annual Review Checklist below.  
[View English Version](https://advisors.principal.com/publicvsupply/GetFile?fm=BB10010&ty=DOC&EXT=.DOC) (DOC) | [View Spanish Version](https://advisors.principal.com/publicvsupply/GetFile?fm=BB10010SPAN&ty=DOC&EXT=.DOC) (DOC)

* **Annual Review Checklist (BB10013C)**  
  [View English Version](https://advisors.principal.com/publicvsupply/GetFile?fm=BB10013C&ty=DOC&EXT=.DOC) (DOC) | [View Spanish Version](https://advisors.principal.com/publicvsupply/GetFile?fm=BB10013CSPAN&ty=DOC&EXT=.DOC) (DOC)

Be sure to also follow up with phone calls to these clients.

1. Follow up with moderate net worth clients.  
   Topic: Risk protection — life/DI combo

Learn about the features and benefits of life and individual disability insurance. Then target clients who could benefit.

Resources:

* **Life and DI Consumer Email (DI2700)**  
  [View](https://advisors.principal.com/publicvsupply/GetFile?fm=DI2700&ty=OFT&requestFromPortal=true&JSPPageURLBase=/wps/myportal/advisor/forms-materials/all-forms-materials/virtual-supply/) (OFT)
* **Risk Protection Infographic―Life & Disability Insurance (LH141POD)**Consider attaching or linking to this PDF in the email above.[View](https://advisors.principal.com/publicvsupply/GetFile?fm=LH141POD&ty=VOP&Ext=.VOP&requestFromPortal=true&JSPPageURLBase=/wps/portal/advisor/forms-materials/all-forms-materials/virtual-supply/) (PDF)
* **Additional materials**

If you choose to send additional emails on this topic, consider attaching or linking to the following resources (and be sure to include clear next steps or calls to action):

* + **Life and Disability Insurance Streamlined Underwriting Programs (LH137)**  
    [View](https://advisors.principal.com/publicvsupply/GetFile?fm=LH137&ty=VOP&Ext=.VOP&requestFromPortal=true&JSPPageURLBase=/wps/portal/advisor/forms-materials/all-forms-materials/virtual-supply/) (PDF)
  + **Life Underwriting Basics Consumer Flyer (BB12189)**[View](https://advisors.principal.com/publicvsupply/GetFile?fm=BB12189&ty=VOP) (PDF)

Follow up with phone calls, as well.

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