Policygenius **Pro**

Email #1: Introduce Term Insurance

Recommended timing: Day 1

Subject line: Let me show you how easy term life insurance can be

Body Copy:

Hi {Client Name},

I know applying for life insurance can be stressful, so let me make it easy for you!

I recently partnered with Policygenius Pro *[insert your co-branded landing page URL here]*, a life insurance fulfillment platform with over 300 dedicated specialists that work with more than 10 life insurance carriers to get you the right coverage for your needs.

Their offerings include policies that you can get approved for in less than 30 minutes - no medical exam needed!

If you're interested, you can get started here *[insert your co-branded landing page URL here]*, or give me a call at XXX-XXX-XXXX. I'd be happy to answer any questions you may have and discuss your options.

Best,
{Agent name}

Policygenius **Pro**

Email #2: Why is life insurance is important

Recommended timing: Day 8

Subject: {Client Name}, life insurance can help protect your family's financial future.

Body Copy:

Hi {Client Name},

Life insurance is one of the most crucial parts of any financial plan. **As your financial planner, I want to make sure you are protected from the unexpected**.

I recently partnered with Policygenius Pro *[insert your co-branded landing page URL here]*, an industry-leading insurance solution that combines modern tech with the attention and expertise of real agents to get you the best life insurance coverage for your needs.

Still unsure about life insurance? Check out this whitepaper that covers the eight most common life insurance myths!

You can get started with your application here *[insert your co-branded landing page URL here]*, and if you have questions, you can call me at XXX-XXX-XXXX.

I look forward to hearing from you!

Best,
{Agent name}

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Email #3: Why is life insurance is important

Recommended timing: Day 15

Subject: Protect your family's financial future with life insurance

Body Copy:

Hi [Client Name],

If someone relies on your financial support — whether it's a child, aging parent, or even a business partner — you need life insurance. It's one of the most crucial parts of any financial plan. And as your financial planner, I want to make sure you and your loved ones are protected from the unexpected.

That's why I recently started working with Policygenius Pro *[insert your co-branded landing page URL here]*, an industry-leading insurance marketplace that combines easy-to-use technology with the attention and expertise of real, licensed agents to help you find you the right coverage for your needs.

If you're looking to make your smartest insurance decision, get started now *[insert your co-branded landing page URL here]*. To learn more and get your questions answered, give me a call at XXX-XXX-XXXX. I'm happy to help.

Have questions on what your life insurance journey might look like? Take a look at this step-by-step walkthrough of the application process.

Cheers,
[Agent Name]

Policygenius **Pro**

Email #4: Simple application process

Recommended Timing: Day 22

Subject: Let's get you life insurance in under 30 minutes - no exam needed!

Body Copy:

Hi {Client Name},

Applying for life insurance used to be a hassle - weeks of underwriting, a medical exam, and years worth of medical records were needed.

I recently partnered with [Policygenius Pro](#) [*insert your co-branded landing page URL here*], an end-to-end insurance platform that makes it easier than ever for you to get the coverage you need. With their proprietary carrier offerings, we can get you covered in a single phone call - no exam or medical records needed!

Let's set up a time to discuss your options! What are some good dates/times on your end?

Best,
{Agent name}