

# Virtual Business Partners

**Sell more... Earn more. Financial planner and insurance agents, if you are spending your valuable client time on paperwork, tracking down requirements, and dealing with administrative and marketing issues, what opportunities are you missing? Let our 16+ years experience as industry virtual assistants help you!**

## ADMINISTRATIVE SUPPORT FOR INSURANCE AND FINANCIAL SERVICE BUSINESSES

- › Call answering assistance
- › Track CEs
- › Track state licensing
- › Carrier appointment paperwork
- › Follow up on pending requirements
- › Client services assistance with prepping forms and applications or assisting client with making general account changes
- › Client concierge, such as birthday and holiday cards
- › Presentation creation
- › Webinar and seminar lead management - support only
- › Calendar management
- › Manage paperwork (meeting notes, call notes, electronic filing of documents)
- › Contact management assistance
- › New agent set up assistance
- › Quote management assistance
- › And much more!

## MARKETING SUPPORT FOR INSURANCE AND FINANCIAL SERVICE BUSINESSES

- › Tracking sales opportunities
- › Warm calling (see below)
- › Webinar and seminar lead management - set up and support
- › Blogging (we can write and publish blog posts for you!)
- › Monthly, quarterly, or annual policy review appointments
- › Web site design, maintenance and SEO
- › Create and manage newsletters
- › Social Media marketing support
- › PR / Media support (industry trained specialist)
- › Marketing, funnels and business development
- › Multimedia – Create videos, video sales letters, video demos, video presentations, webinar development, etc.
- › And much more!

## BACK OFFICE SUPPORT

The back office can be thought of as the part of a company responsible for providing all business functions related to its operations. The back office is an essential part of any firm and associated job titles and functions are often classified under "Operations."

We offer real-world, practical solutions that speak to your Back Office needs, goals, and strategies:

- › Proposing, managing and maintenance of software and technology tools necessary to run your business.
- › Setting up documentation to support SOPs and company best practices.
- › Keeping the accounts and financial details.
- › Providing management and support solutions properly for sleek business operations.
- › Providing back end specialized solutions and trouble shooting solutions.
- › Analyzing various functions of the company and suggest any changes or upgrades of the same according to the business's development.

**››› CONTACT US!** Schedule a call with us: [doreen@virtualbusinesspartners.net](mailto:doreen@virtualbusinesspartners.net)  
Visit us online to learn more: [www.virtualbusinesspartners.net](http://www.virtualbusinesspartners.net).  
Give us a call at: **815-556-8465**

