

THE NEWSLETTER FOR GEM STATE FINANCIAL GROUP



HIDDEN GEM



Pages 4-5

Announcements

Be sure to read page 4 and see the changes that are coming for GSFG. We are excited to introduce David Riffe - Director of Sales and congratulate Preston on his BAA in Supply Chain Management from Boise State University.

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Lloyd's of London

We had a successful meeting with the Peterson International Group this past month. We are pleased to announce we have contracted with them to offer Lloyd's of London to your clients for Disability & Life Insurance. We have included their flyer with these offerings.

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Referrals!

We would like to remind you of the financial opportunity available to you with referring qualified candidates to GSFG. For every successful candidate that becomes contracted you can earn a 10% override on any business they place.

Agency Trainings

June 17th - Retirement Planning for Groups
Chris Horne, Ameritas

July 1st - Ameritas Producer Workbench, Illustration
& Other Tools Training - Scott Leavitt

To join the agency trainings:

<https://global.gotomeeting.com/join/952783349>

Phone: 1 (646) 749-3112

Access Code: 952-783-349

Jon Geier, Ameritas Internal Wholesaler

Phone: (402) 465-6128

Email: jgeier@ameritas.com

Scott's Thought:

As we near the mid-point of the year, it is good to review our goals for the year. Are you on track to hit the goals you set for 2019? Do you need to re-adjust your goals, are you ahead of schedule or do you need to ramp up your activity? Let us know how we can help you get there by calling Preston, David or myself!

-Scott



Congratulations

Monthly Drawing Winner...

Randy Flem



Contest Standings:

- 1st – Tom Shores
- 1st – Tracy Boster
- 3rd – Melinda Wells

WE'RE ON SOCIAL MEDIA!

Click on the logos bellow to follow us for content you can share with clients and for upcoming events.



NEED HELP?

CONTACT US:

Scott Leavitt, President/General Agent

Phone: (208) 850-7003

Email: scott.leavitt@gemstatefg.com

Preston Leavitt, Director of Agent/Advisor Services

Phone: (208) 891-6901

Email: preston.leavitt@gemstatefg.com

Mike Patrick, V.P. Wealth Management

Phone: (208) 377-1428

Email: michael.patrick@gemstatefg.com

David Riffe, Director of Sales

Phone: (208) 377-1428

Email: david.riffe@gemstatefg.com

Gem State Financial Group's newest Team Members:

David Riffe, Brad Gardner, Diana Hunter & Jay Thurlow

Gem State Financial Group Upcoming Events

April 1st -

June 30th

Gearing up for Summer Sales Contest

“Where will your Spring sales take you this Summer?”

June 29th -

July 2nd

NAHU Annual Convention

Sheraton San Diego Hotel and Marina

San Diego

August

9th

TVAHU Annual Golf Tournament

Falcon Crest Golf Club

Kuna

Summer Birthdays

Wishing each of you a wonderful day and successful year!

June

July

August

6/6 Jeff Orton

7/9 Erik Heinke

8/14 Larry Reitz

6/14 Diana Hunter

7/11 Rick McDonald

8/31 Robin Everitt

7/15 Jackson Longwill

8/31 Wes Brinkman

ANNOUNCEMENTS

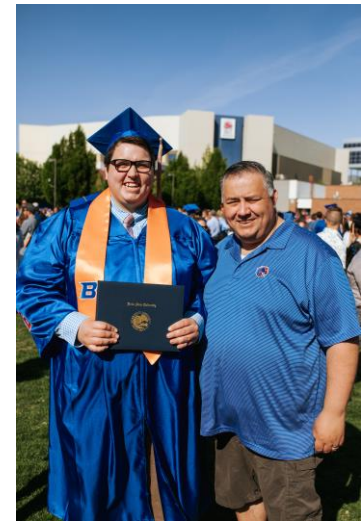


David Riffe

Director of Sales

We would like to welcome David Riffe to our GSVG Family. He has been hired as our new Director of Sales. David is eager to teach, empower, and assist our team of dedicated financial advisors. He looks forward to helping them grow their financial planning practices. He has been involved with financial planning and wealth management since 1997, serving clients at companies such as Merrill Lynch, Smith Barney, Moss Adams Wealth Advisors and MetLife Premier Client Group. These experiences have proven to David that everyone needs a plan to achieve their financial dreams. It was this belief that led David to dedicate himself to his clientele and their success. In addition to his professional experience, David has also attained the CERTIFIED FINANCIAL PLANNER (CFP®) and ACCREDITED INVESTMENT ADVISOR (AIF®) certifications.

Before relocating to the Treasure Valley David was a 13 year resident of Snohomish, Washington, where he lived with his wife, and their two sons and their yellow lab. He is a graduate of the University of Washington, where he majored in International Economics. In his spare time, David serves as the Membership Chairman for the Boise Rotary club and previously served as President of the Rotary Club of Kirkland Downtown. He has also been involved with the Wyakin Warrior Foundation serving as a community mentor to wounded service men and women. In his spare time, he enjoys skiing, golf and spending time with his two boys.



CONGRATULATIONS!

We would like to congratulate Preston Leavitt on his BAA in Supply Chain Management from Boise State University! Preston has accepted the position of Director of Agent/Advisor Services and will be joining our firm full-time. We would like to congratulate you Preston on your hard work and perseverance through your studies and helping GSFG and our agent's grow their business.

Preston's new role will entail some of the following:

- Contracting Agents/Advisors with Ameritas, Brokerage carriers & AIC.
- Running illustrations for Life, DI, Annuity, LTC & Final Expense.
- Managing the policy underwriting and service process, including ordering exams if needed.
- Agent/Advisor training & orientation
- Tech & CRM support.



SPECIALTY DISABILITY INCOME

PRODUCTS AVAILABLE

Personal Disability Income

- High-Limit DI
- Medically Substandard DI
- Senior Age DI
- Graded Benefit DI

Business Disability Income

- Buy/Sell DI
- Business Overhead Expense DI
- Contract Guarantee DI
- Key Person DI
- Loan Indemnification DI
- Severance DI
- Salary Continuation DI

Guaranteed-Issue Disability Income

- Personal High-Limit DI
- Buy/Sell DI
- Business Overhead Expense DI
- Key Person DI
- Severance DI

For more information on offering these Disability Income products to your clients, please contact Scott Leavitt or Preston Leavitt at (208) 377-1428

LLOYD'S

Financial Ratings

A.M. Best: A (Excellent)

Standard & Poor's: A+ (Strong)

Fitch Ratings: AA- (Very Strong)

As Coverholder at Lloyd's of London, Petersen International Underwriters has the authority to quote, underwrite, and issue policies on behalf of certain underwriters at Lloyd's. The Lloyd's market has been in existence for over 325 years. No other insurance company can match the longevity, the flexibility, and the financial stability of Lloyd's of London. Realizing the value of the market, Petersen International Underwriters partnered with Lloyd's and became an approved Coverholder in 1983. Since then, we have developed a series of specialty Medical, Disability, and Life insurance products boasting the financial backing of Lloyd's of London.



GEARING UP FOR SUMMER CONTEST

Where will your Spring Sales take you this Summer?

Contest Dates:

April 1st - June 30th, 2019

GRAND PRIZE: \$250.00 Marriott Gift Card



2ND PRIZE: \$100.00 Gas Card

3RD PRIZE: \$50.00 Date Night



How to earn points:

- 1 point for each submitted Life, DI, or Annuity Policy with Ameritas or Brokerage*
- 1 point for each paid Life, DI, or Annuity Policy with Ameritas or Brokerage*
- 1 point for every \$500 in paid Ameritas Life or DI FYC
- ¼ point for every \$500 in paid Ameritas Annuity or Brokerage* FYC

* Brokerage Business (Non-Ameritas Life, DI, LTC, and Final Expense Life Insurance)

ONE



Gem State Financial Group is offering an opportunity for **ALL CONTRACTED AGENTS/BROKERS** to help us grow the agency. Your recommendation of a new Career or Independent Agent to Gem State Financial Group can grow YOUR income. *When that referral becomes part of the Gem State Financial Group Team you will receive 10% of their **Ameritas Life** {Life and DI only} FYC production for as long as they write business. Refer a producer, work with him/her, split business with him/her and earn dollars while we all benefit to make this the biggest and **best** firm in the Company.

Please complete the following and return to Scott Leavitt; General Agent

*Referring Agent must maintain a contract (specified by Ameritas) to continue qualifying for bonus.

Name: _____

Address: _____

Phone Number: _____

Best Time to Call: _____

Agent/Broker Name: _____ Date: _____