



Building a

career



you'll love

 **Convergis™**
Achieving more together™



Why Convergis?

Convergis is a unique business development program designed for people who are in the life insurance business or who would like to build their career in this exciting industry as an independent insurance advisor.

As a Convergis Advisor you'll enjoy many benefits not often offered to new advisors, including:

- Building a career you'll love
- Being a part of something important
- Flexible hours
- Achieving your aspirations
- Business coaching
- Establishing a client base
- Control over your income potential
- Production-based performance
- Achieving more together



Building a career you'll love

You're curious to know more.

You're considering a career as an independent insurance advisor. We're delighted you're considering Convergis.

Being part of something important

Canadian families are vastly underserved by a lack of advice on protection products. 6.1 million Canadian families say they do not have enough life insurance. And a further 3.9 million have never been approached on the subject. The opportunity is there, and when a catastrophic event happens, those families need your support.

Control over your income potential

When you build a business that you own as an independent insurance advisor, you're in control of your income, and ongoing business relationships. It's hard work, but it's very rewarding.

Flexible hours

Self-employment creates a necessity to work hard and build your business. Yet it provides the flexibility to work on your terms and have time for your personal commitments too.



Achieving your aspirations

You have personal and career aspirations. Your personal coach will work with you to design the business goals, and the implementation tactics that achieve those aspirations.

Business coaching

Every advisor who joins Convergis works with our team of professionals to help build your business. We help you create your business plan tailored to industry best practices that align with your personal aspirations. You will receive regular and consistent coaching to keep you on track and adjust your efforts as new challenges and opportunities arise. Your business plan will encompass all aspects of the business, from activity planning, client engagement, marketing initiatives, business management, and more.

Establishing a client base

Experienced insurance advisors all started working with the natural market of the people they already knew. Your personal coach will help you determine the best strategies to talk to these people and engage them in quality conversations that determine whether they are a fit to do needs-based insurance planning with you.



We are looking for people who care

Convergis advisors help protect families by offering them solutions to reduce financial uncertainty caused by premature death or illness. Life insurance and critical illness protection can allow a family to focus on overcoming these difficult times without worrying about finances. Do you want to have a positive impact on families in your community? Well, you can, by reducing their financial risks and delivering dollars to families when most needed.

Make a difference

At this point in your life, you want to do more than just make a living; you want to do something meaningful.

Imagine a family facing financial challenges upon the death of a loved one or upon the diagnosis of a critical illness such as cancer, heart attack or stroke. That's a reality for many - but it doesn't have to be.

Imagine being able to help answer the question, "Is everything going to be okay?"



Your role as an independent advisor

As an independent advisor you would be working with individuals, families and businesses. Your initial role is to provide solutions to potential risks. But your most important role is to be there to help with claims when they occur, and coordinate the plans you put in place originally. We would provide you with the tools and training to develop a plan for their specific situation, monitor and adjust this plan, and assist the families in need at claim time, all in a professional and courteous manner.

Control over your income potential

Are you looking to own a business?

While there are no guarantees and your income would be commission-based, there is also tremendous potential for those willing to invest in building a new business. As well, protection products provide a renewal income that create long term business revenue and value.

With an entrepreneurial spirit and our support, Convergis Advisors have found tremendous success. You can too.



Build a business

What does success look like to you? Many people consider controlling their own destiny as a key factor. If it also means flexibility, being your own boss and the opportunity to grow a business with significant financial possibilities, it may be worth a conversation.

Production-based performance

Your commission-based compensation will vary with each client situation. A greater portion of the compensation is paid initially to compensate you for the time required with analysis and advice. A lesser renewal portion is then paid out annually afterwards.

Convergis also provides unique activity based bonuses for the first three years, in order to help you get started on the right track.

Essentially, the more clients you help protect, the more you will earn.

We're not saying it's easy. Being a Convergis Advisor is hard work. But if you're serious about building a successful business, the potential for personal and professional rewards are great.



Achieving more together

Partnership Agreement

Every Convergis contract is a partnership between *ivari*, your MGA and you, the Advisor. For it to work, each partner must remain committed to meeting their obligations.

For *ivari*, that means providing the structure, and a wealth of tools and processes. It also means providing internal experts to assist your coach.

Your MGA provides the day-to-day support, and a Business Coach to keep you focused.

And as an Advisor, you bring coachability and determination. Moreover, we're looking for Advisors who value their independence, who are dedicated to making a difference with their business and to putting in the work needed to make that a reality.



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