

# First Five

Highly Compensated Employees (HCE)

Disability Income Protection Revenue Generator

Filter your book of business by following the steps below to identify **FIVE** clients for the HCE Disability Income Protection program.

## STEP 1

### Determine Ideal Client

Review Inforce  
Long-Term Disability (LTD) Clients



Inforce LTD Carriers  
Guardian, MetLife, Principal, Standard, Unum



Industry Focus  
Legal, Investment/Banking Services, Technology,  
Manufacturing & Business Services

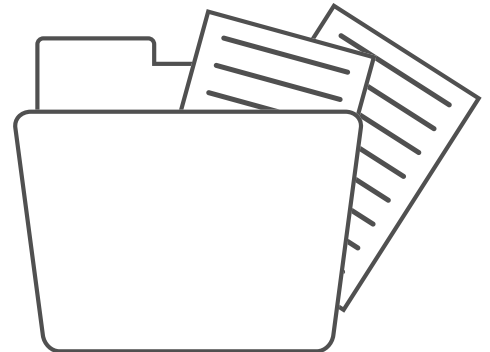


Rank Relationship Strength  
1 (Strongest) to 5 (Weakest)  
Direct C-Suite Relationship Length of Relationship  
Multiple Lines of Business

## STEP 2

### Gather Additional Information

- Inforce LTD Certificate Booklet
- Current Employee Census
- Provide Relationship Manager



## STEP 3

### Let's Discuss!

Secura Consultants will reach out to schedule a 30-minute strategic review discussion with the relationship manager to determine next steps.