

ELEVATE

IN-BOOK MARKETING

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Monthly

Business Insurance Renewals (30 days prior)

All Term Life

All Life by Birthday RAZoooCo

Age 65 in next 12 months

Retirement Planning Key Ages: 59, 62, 67, 70, and 73

Annuity Renewals

January

Auto No Fire

250/500/100 no PLUP

Home No Auto

Renters age 45+ years old

See Monthly List

February

Auto no Fire

Renters no Auto

**Renters \$1000 deductible

Renters age 45+ years old

See Monthly List

March

Life Only

See Monthly List

April

See Monthly List

May

Auto No Fire

Home No Auto

See Monthly List

June

Auto No Fire

Renters no Auto

See Monthly List

July

See Monthly List

August

See Monthly List

September

Renters age 45+ years old

See Monthly List

October

Auto No Fire

Home No Auto

Renters Age 45+ years old

See Monthly List

November

Auto No Fire

Renters No Auto

See Monthly List

December

See Monthly List