



Go to [www.jointopbroker.com/abx](http://www.jointopbroker.com/abx) to request an account and access **exclusive pricing!**



*The CRM solution for health & life insurance agencies - designed by agents!*

### Why Choose TopBroker CRM?

TopBroker CRM is a web-based agency management system that provides the tools necessary for business growth, agency management, agent and client retention, and sales and marketing automation - built for agencies in the health and life insurance industry.



Dedicated In-House Support Team



Industry-Leading Integrations



Real-Time Dashboard



Customized Reports



Branded Quotesheets



Notifications & Alerts

### Management

- ✓ Keep track of each and every interaction
- ✓ Conveniently store your client data in one place
- ✓ Monitor team activity, operate lead distribution amongst your team, and send team alerts

### Technology

- ✓ Automated text and email capabilities
- ✓ Custom and real-time reporting features
- ✓ Improve marketing efforts with auto-responders, email blasts, and more!

### Integrations

- ✓ **Exclusive integrations with Zoom and Stripe**
- ✓ Integrations with industry-leading vendors
- ✓ Manage leads from a single platform and have the ability to auto-distribute within your team

### What They Say About TopBroker CRM

“My team has been using TopBroker CRM for a few years now. We immediately saw an increase in production upon implementation, and we have maintained those levels since. TopBroker also helps us have some of the highest agent retention in the industry. My agency has doubled production in just three years.”



**Brooke Davis**

TopBroker CRM Support

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TopBroker CRM is one of the only customer relationship management tools (CRM) that was developed by and designed for agents in the health and life insurance industry. Start changing the way your agency does business!

### Stand Alone

When a plan fit for one is all you really need.

### Agency

The ideal plan for teams of two or more.

- Unlimited Lead Profiles
- Email Text & Automation
- Unlimited File Storage
- Lead Integration
- Reporting and Data
- Customized Workflows
- Lead Distribution
- Quotesheets
- Team Management



#### For Agency Plans:

##### For 15+ Accounts:

We will waive \$119.95/mo for the administration fee

##### Full-Service Admin Features:

- Built-in action schedules
- New agent creation
- New agent training (1x/mo)
- Lead flow strategy & setup
- Carrier/training updates

##### Additional Users:

\$39.95 per user, per month

~~\$99.95~~

**\$79.95**

per month

~~\$149.95~~

**\$119.95**

per month

All Plans Include: Free account setup, text messaging, and unlimited technical support

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