

CHALLENGE

A national banking institution engaged Patpatia & Associates to integrate insurance and annuity offerings into its current product offerings. This was part of a greater strategic effort to deliver comprehensive asset management services to clients and facilitate asset gathering techniques.

PATPATIA & ASSOCIATES ACTIVITIES

- ✓ Design of variable life and annuity products which utilize underlying proprietary investment offerings
- ✓ Strategic deployment of insurance planning benefits marketing into greater wealth management and advisory services
- ✓ Integration of required insurance sales and marketing elements into platforms and workflows allowing banking professionals the ability to cross-sell products
- ✓ Long-term development of internal underwriting resources to support sophisticated product offerings



THE RESULTS

Our client was able to successfully launch and sell the insurance and annuity offerings in their current proprietary channels. Our tangible, on-time approach allowed our client to complete implementation within six months, rapidly deploying the offering to the marketplace.