

# HOW TO CONVERT MORE TERM POLICIES



Determine which policy to review



Look up basic policy information in database, file, or by calling the carrier



Order table of rates and premiums after level period ends



Review contract & call BGA or carrier for convertible-to options & limits



Prepare a client report with a policy summary and list of options



Run variety of conversion quotes on your quoting system



Run replacement quotes if term is still desired



Send report to, or meet with, client to discuss the options



Convert the Term!



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