INTEGRITY VIP CONCIERGE SERVICES

Connection

EDJ advisor shares Integrity VIP Concierge educational resources and contact information with client

Client follows link to schedule initial appointment & review educational resources

Education

Integrity VIP Concierge agent initiates an introductory call focusing on education, discovery, and needs analysis

Evaluation & Enrollment

Integrity VIP Concierge agent reviews coverage options with client, assisting them to make the choice that suits them

Integrity VIP Concierge agent enrolls client in the plans of their choice

Follow up & Service

Integrity VIP Concierge agent follows up with client post enrollment to ensure

Confirmation of policy status

Proper receipt of all necessary plan information

Review any initial question about plan utilization

Integrity VIP Concierge agent follows up with client at regular intervals throughout the plan year to ensure client satisfaction, and review any future changes or enrollment periods

Learn more about Integrity VIP Concierge Services

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