



## Chris D. Callen, Insurance Agent

"Helping Professionals Nationwide"

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"Serving Our Clients Since 1981"

### Prospective Planner Client:

We welcome the opportunity to introduce our firm, Chris D. Callen, Insurance Agent, a truly independent insurance agent, located on the outskirts of Columbus, Ohio, specializing in serving the disability, life, long-term care, succession and estate planning needs of our professional clients in all 50 states and Washington D.C. for over 32 years.

While building or running a successful business many of your clients do not have the time it takes to insure an effective and streamlined insurance program. We have developed a unique strategy that tailors all of your clients insurance needs into one cohesive package, without regard to a particular insurance company. Our copyrighted insurance planning process, "*The Focus Strategy Approach*" has been routinely used by many of the top fee-based CPA / financial planning firms and professional practice management companies around the country as a resource for designing and implementing the insurance module of their client's financial plan.

Perhaps you have seen our articles or advertisements in major professional journals such as "*Dental Economics*", "*The Profitable Dentist*", "*The Richard's Report*" and Sally McKenzie's "*Dentist's Network Newsletter*". Our program has been presented throughout the country by such national practice management companies such as Ken Runkle's **Paragon Management Associates** workshops in addition to many state dental workshops and national dental study club meetings.

Details of our "*Focus Strategy Approach*" program are highlighted in the enclosed marketing pieces as well as at our website at [www.cdcallen.com](http://www.cdcallen.com). Our entire process, from client introductory meetings to policy delivery, is normally done through the use of Webinars and HIPAA certified emails and encrypted file transfers. You or your client will never again be bothered wasting precious time by requiring face to face meetings. As long as you and your client have internet service we can be available.

We welcome the time to discuss the possibility of becoming a resource for both you and your practice by offering the advantage of a fee-free proven system that applies progressive insurance concepts, without all the confusion that typically surrounds an insurance presentation. I can assure you that you will find no harder working group of people that will deliver your client's expectations, and with the respect and professionalism both you and they deserve.

I have enclosed a copy of our firm's most recent marketing pieces for you to review at your leisure. If we have yet to do so we would enjoy the opportunity to schedule a brief meeting or teleconference call to allow us to gain a better understanding of your practice needs and how we may help you.

Sincerely,

Chris D. Callen

