

LIFE INSURANCE AWARENESS GUIDE



Your 4-Week Plan to Maximize
Life Insurance Awareness Month



SIMPLIFYING YOUR SALES SUCCESS

Leverage IAD's 7 Pillars of Success
to Grow & Scale Your Business

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TURN SEPTEMBER INTO YOUR BEST MONTH YET

Build a complete Life Insurance Awareness Month [LIAM] campaign that drives conversations, leads, and sales.

September is Life Insurance Awareness Month (LIAM)—a nationwide effort to educate clients about the importance of life insurance. For agents, it's a golden opportunity to start conversations, grow your book of business, and position yourself as the go-to expert.

This guide will help you:

- A 4-week campaign calendar to organize your outreach
- Ready-to-use social media posts, email ideas, and conversation starters
- Strategies for referrals, events, and client re-engagement



4-WEEK CAMPAIGN CALENDAR

Your Life Insurance Awareness Month Game Plan

Week 1 (September 1–7): Kick Off the Campaign

- Post a LIAM announcement on social media [use #LIAM2025].
- **Send Email #1:** “Why Life Insurance Awareness Month Matters” to your clients and prospects.
- Reach out to referral partners [CPAs, mortgage brokers, advisors] and share your campaign calendar.

Week 2 (September 8–14): Educate & Engage

- Share a myth-busting graphic or video: “5 Life Insurance Myths That Could Cost You.”
- Host a webinar or live Q&A on Facebook/Instagram.
- **Send Email #2:** “Life Insurance is More Affordable Than You Think.”

Week 3 (September 15–21): Highlight Real-Life Stories

- Share a client testimonial or story [with permission] on social and email
- Run a referral push: Offer a compliant incentive or drawing for referrals.
- Post a “life insurance quiz” or poll to drive engagement.

Week 4 (September 22–30): Drive Calls to Action

- **Send Email #3:** “Get Your Life Insurance Check-Up Today.”
- Post social graphics urging clients to schedule appointments.
- Follow up with prospects who engaged earlier in the month.



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CONVERSATION STARTERS + RESOURCES

How to Start the Life Insurance Conversation

3 Easy Questions to Ask Clients:

1. “If something happened to you tomorrow, how would your family pay the bills?”
2. “When was the last time you reviewed your current life insurance coverage?”
3. “Did you know term life insurance can cost less than a cup of coffee a day?”

Top Referral Sources to Contact:

- Financial advisors
- CPAs and tax preparers
- Mortgage brokers and real estate agents
- Small business owners

Pro Tip: Bring a co-branded LIAM flyer or leave-behind to referral meetings.



READY-TO-USE MARKETING IDEAS

Plug-and-Play Campaign Tools

- **Social Media Pack:** 15 ready-to-use posts with captions and graphics.
- **Email Templates:** 3 pre-written emails you can send to your list.
- **Direct Mail Templates:** Postcards and letters to re-engage inactive clients.
- **Webinar Kit:** Slides, registration templates, and scripts for educational events.

Contact IAD today to get the full Life Insurance Awareness Month Campaign Kit and access to all templates, graphics, and compliance-reviewed materials.

NEXT STEPS

Plan Now to Reap the Rewards

- Choose at least two channels [social + email, direct mail + webinar, etc.].
- Block time on your calendar now for client calls and follow-ups.
- Leverage IAD's full marketing support to make execution easy.

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START YOUR JOURNEY WITH IAD AND UNLOCK YOUR BUSINESS POTENTIAL!

YOUR SUCCESS IS OUR MISSION...

When you choose Insurance Advisors Direct, you're not just selecting an FMO; you're gaining a dedicated business ally. Our 7 Pillars of Success are designed to help you grow, scale, and thrive.

We're grateful for your interest in partnering with us. Our agents and partners are the heart of our success, and your dedication makes IAD stand out. Thank you for being part of our journey!

READY TO ELEVATE YOUR BUSINESS?

Join the IAD team and unlock exclusive perks and incentives, including:



**CARRIER INCENTIVES
AND BONUS PROGRAMS**





**TOP PRODUCER RECOGNITION
AND REWARD TRIPS**



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