

#18 – Life Cross-Sell

**To use this template, you will need:**

* An email sending platform. Constant Contact and Mailchimp are good options. You may be able to start with a free trial.
* An email mailing list saved in Excel. Your list should contain an email address for each prospect. You will need to upload your list to your email sending platform.
* Your logo to insert into the template.
* Your DIS quote engine URL. If you don’t have this, contact [it@diservices.com](mailto:it@diservices.com) to obtain it.
* The quote engine icon you wish to use. You can download the color and size of your choice at <https://www.diservices.com/quote-engine-icons>

**To set up your email:**

1. Log in to your email platform and start a new project/email.
2. Upload your images, including:
   1. The header image of this email.
   2. Your company logo
   3. Your quote engine icon

To upload images, you will right click on the image in this Word doc, save it to your computer and then upload it to your email platform.

1. Copy and paste the text in this Word document into the email platform. Adjust the formatting, spacing and font size – 14 pt. usually works well in HTML emails.
2. Add your contact information where it is noted.
3. Insert the quote engine hyperlinks into the underlined “request a quote” text as well as into the quote engine icon.
4. Insert your email address into the underlined “contact me” text.
5. Consider linking the header image to your website, if you have one.
6. Add the subject line.
7. Send yourself a test email, so you can verify the links are working and everything looks good.
8. Upload your list and schedule your email.

Subject Line: You’re Prepared to Die, but are you Equally Prepared to Live?

Congratulations!

You’ve already completed an essential financial planning step when you purchased life insurance to protect your loved ones if you’re not here to provide for them.

**Now, here’s another question to consider in your financial planning journey: What if you are here, but you are unable to work?**

Disabling illnesses and injuries happen more often than you might expect. In fact, one in five adults have a disability. Imagine … what would happen if you had to take a year off work to overcome a cancer diagnosis? Would your family have the financial means to carry on, or would you face significant financial stress?

Like life insurance, paycheck protection (also known as disability insurance) is an essential element in every financial plan. Even if you have some protection through your work, an additional individual disability insurance policy is recommended.

**Request a complimentary quote today or contact me to learn more.**

Warm regards,



<Insert Broker Name>

<Insert Broker Phone Number>

<Insert Broker Email Address>

<Insert Broker Logo>