

#3 Simplified Underwriting Available

**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: Simplified Underwriting Now Available!

Good News!

Simplified underwriting is now available for disability insurance. That means no medical  
exams, no blood work, no urine samples, no income documentation and no personal  
history interviews (PHIs)!

Getting the paycheck protection you need has never been easier.

Protect your earning power today. After all, it is your most important asset.

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

Warm regards,



<Insert Broker Name>

<Insert Broker Phone Number>

<Insert Broker Email Address>

<Insert Broker Logo>