

Friends and Family Campaign

Background

- Many new agents struggle to see early success, get frustrated and seek other career options
- Most agents don't know how to get some quick and easy wins to boost their confidence and give them some commissions they can re-invest in leads to fuel their business
- Given the ease and speed of Ethos, this powerful solution can help new agents overcome these initial objectives

Objective

- Develop a "Friends and Family" campaign for new agents that uses Ethos to convert this audience into policies
 - It does not cost an agent any money to reach out to this audience
 - This audience will be more receptive to a pitch from a family member vs. an agent that they don't know
 - Ethos provides coverage for most individuals in 10 minutes, does not require a medical exam, and pays commissions weekly

Strategy

- Develop a mix of emails, SMS messages and social posts that drive friends and family to submit an application via Ethos
- We will use a mix of different messages that appeal to different emotions to drive action from this audience
- Campaign should run over the course of 3 weeks, with each individual week getting a social post, a email and an SMS message

Proposed Copy for Campaign

Week #1 - Show care & concern by explaining "why I am becoming an agent"

Social Post #1 | Why I am becoming an agent

I'm happy to share some big career news. I've joined [[Insert agency name](#)], and I'm now a licensed life insurance agent! I made this decision because I'm passionate about helping families and making sure that they're protected against anything that life throws at them.

In my new role, my first priority is making sure that my closest family and friends have the coverage they need. My agency uses Ethos Life to make applying for a policy quick and easy online. You just answer some health questions (no medical exams) and about 95% of people can get covered on the spot. The entire process takes about 10 minutes for coverage up to \$2M. You can get a free quote instantly here:

[\[Insert Your Ethos Personalized Link Here\]](#)

If you have any questions, just let me know! I'm so excited to help you get the coverage you need for your family. Thanks so much for supporting me in this decision!

Email #1 | Why I am becoming an agent

Subject Line	You now know a life insurance agent—me!
Pre Header	Let me help you take the first step toward protecting your family
Body Copy	<p>[Name],</p> <p>I have some news to share: I'm now a licensed life insurance agent! I'm so excited to take this new step in my career and love that my new job allows me to help families get the protection that they need.</p> <p>Naturally, I wanted to reach out to those I care about the most —my closest family and friends — and make sure you have the right amount of coverage. I work with a company called Ethos Life that offers a 100% online application and policies up to \$2M in minutes. They do it with no medical exams, blood draws, or intrusive home visits, just a few health questions.</p> <p>Here's the link to get a free quote: [Insert Your Ethos Personalized Link Here]</p> <p>Is it time for a life insurance checkup?</p> <p>The fact is, millions of Americans are underinsured, or only insured through their employer. Workplace policies are a great start but they're usually only a fraction of what your family really needs, and a job change can leave everyone vulnerable.</p> <p>I know many of you have expanded your families, moved to bigger homes or seen other life changes over these past few years. Even if you have some coverage today, it takes seconds to get a free quote and see if I can provide you with additional coverage to close a gap. I may even be able to get you a better price on your current coverage.</p> <p>The new way to buy life insurance: instantly</p> <p>Ethos works with top carriers to make getting life insurance quick and easy. And they approve about 95% of people, even with health conditions.</p> <p>If you like what you see, you can activate your policy and be covered immediately. The whole process takes about 10 minutes! You can get your free quote here: [Insert Your Ethos Personalized Link Here]</p> <p>I would love to help you get the protection you need. If you'd like to talk through your family's life insurance needs, please reach out today! I look forward to hearing from you.</p>

	<p>Warmest regards,</p> <p>[YourName]</p>
Footer	<p>This is an ad.</p> <p>© 2022 Ethos Technologies Inc. Ethos operates in some states as Ethos Life Insurance Services. CA license #0L28949; AR license #100164629. Ethos offers policies issued by the carriers listed at www.ethoslife.com/carriers. Products and their features may not be available in all states. To help avoid requiring a medical exam, our application asks certain health and lifestyle questions. The information and content provided in this email is for informational purposes only and is not to be considered legal, tax, investment, or financial advice. No contract is formed or amended by this email. Click to unsubscribe.</p> <p>5001 Plaza on the Lake, Suite 305, Austin, TX 78746.</p>

SMS Message #1 | Why I am becoming an agent

[Name], I'm now a licensed life insurance agent & can help you w/instant coverage! Free quote: [Your Ethos Link Here](#) Pls call/text w/?s.

Week #2 - Create urgency by explaining "why having life insurance is a necessity"

Social Post #2 | Why having life insurance is a necessity

[Name],

I hope that everyone saw my post last week about my decision to become a life insurance agent. I got a lot of great feedback from many of you, and I've already had a chance to help some friends and family get protected!

A few of you reached out and told me that "I'm covered by my workplace life insurance policy." Unfortunately, that coverage probably isn't enough—the rule of thumb is to have 10x salary in coverage. Most workplace policies only offer one to two times salary, coming up eight to nine times short.

I can help you supplement that coverage with life insurance from Ethos Life. Start with a free quote, and if you like what you see, it only takes about 10 minutes to get same-day coverage.

I look forward to helping your family get the protection they need! Please reach out today with any questions, or get started here: [Insert Your Ethos Personalized Link Here](#)

Warmest regards,

[YourName]

Email #2 | Why having life insurance is a necessity

Subject Line	Make sure that you have right amount of coverage for your family's needs
Pre Header	Get instant, affordable life insurance up to \$2M with Ethos Life
Body Copy	<p>Hi [FirstName],</p> <p>I wanted to follow up again regarding your current life insurance coverage. While every family is unique, a general industry rule of thumb says you should have coverage equal to 10x your combined annual salary. Why so high? Because life is expensive. In fact, 44% of American families would experience financial hardship within six months of the death of the family breadwinner.¹</p> <p>With life insurance, it doesn't have to be that way. Join the ranks of American families who can go to bed at night with peace of mind, knowing they're protected financially if something goes wrong.</p> <p>To get your family the protection that you need, I recommend using Ethos Life. Here's a little more about their solution:</p> <ul style="list-style-type: none">• They offer a 100% online application. That means no medical exams, blood draws, or intrusive home visits, just a few health questions.• They approve most people instantly, even with health conditions. If you like what you see, you can activate your policy and be covered immediately.• They only work with trusted, top-rated insurance companies, so you can feel confident you've made the right choice. <p>Use this link to get a free quote and apply now:</p> <p>[Insert Your Ethos Personalized Link Here]</p> <p>Get this important item checked off your list!</p> <p>[YourName]</p>
Footer	<p>¹ 2021 Insurance Barometer Study, Life Happens and LIMRA</p> <p>This is an ad.</p> <p><small>© 2022 Ethos Technologies Inc. Ethos operates in some states as Ethos Life Insurance Services. CA license #0L28949; AR license #100164629. Ethos offers policies issued by the carriers listed at</small></p>

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SMS Message #2 | Why having life insurance is a necessity

[Friend / Family Name], did you know that 44% of American families would experience financial hardship within six months of the death of the family breadwinner? I don't want any of my friends and family to have to deal with that struggle so I now offer same-day life insurance coverage with Ethos Life. Get your free quote here: [Insert Your Ethos Personalized Link Here](#) STOP to opt out

Week #3 - Eliminate financial excuses by "addressing myth around cost of coverage"

Social Post #3 | Addressing common life insurance myth around cost of coverage

Since I became an agent, I've found that getting life insurance is much more affordable than I expected. If the cost is holding you back, you're likely overestimating how expensive the right coverage will be. However, you don't need to take my word for it! It takes seconds to get a free, no obligation quote from Ethos Life today here: [Insert Your Ethos Personalized Link Here](#). If you like what you see, it takes about 10 minutes to answer a few health questions and turn that quote into lasting life insurance protection for your family.

Email #3 | Addressing common life insurance myth around cost of coverage

Subject Line	Get affordable life insurance that's faster than ever
Pre Header	An exciting new opportunity to get coverage for less—in about 10 minutes!
Body Copy	<p>[FirstName],</p> <p>Did you know that most people overestimate the cost of insurance by three times or more?¹ See how much you can save today when you apply for life insurance through Ethos Life. In 10 minutes or less, you can fill out your application and get approved for instant coverage.</p> <p>Insert Your Ethos Personalized Link Here</p> <p>Here's how to get started:</p>

	<ul style="list-style-type: none"> ● Get a quote - Answer a few simple questions about yourself and get a quote in seconds. ● Apply in minutes - Ethos uses a fast, straightforward application that's 100% online, so you don't even need to chat with me get a policy ● Get covered - Once your application is submitted, we'll process the information to provide you with a quick (often instant) decision on coverage eligibility and your rate. If approved, you can activate your coverage immediately. <p>You could get affordable life insurance protection for your family checked off your list in the next few minutes!</p> <p>[Insert Your Ethos Personalized Link Here]</p> <p>If you have any questions or concerns, just let me know,</p> <p>[YourName]</p>
Footer	<p>¹ 2022 Insurance Barometer Study, LIMRA</p> <p>This is an ad.</p> <p><small>© 2022 Ethos Technologies Inc. Ethos operates in some states as Ethos Life Insurance Services. CA license #0L28949; AR license #100164629. Ethos offers policies issued by the carriers listed at www.ethoslife.com/carriers. Products and their features may not be available in all states. To help avoid requiring a medical exam, our application asks certain health and lifestyle questions. The information and content provided in this email is for informational purposes only and is not to be considered legal, tax, investment, or financial advice. No contract is formed or amended by this email. Click to unsubscribe.</small></p> <p><small>5001 Plaza on the Lake, Suite 305, Austin, TX 78746.</small></p>

SMS Message #3 | Addressing common life insurance myth around cost of coverage

While I've already sent you a few messages, I wanted to follow up one last time about getting you life insurance coverage though Ethos Life. You'll be surprised at how affordable it is to get your family the protection you need. Don't believe me? Get a free quote and see for yourself: [\[Insert Your Ethos Personalized Link Here\]](#) STOP to opt out