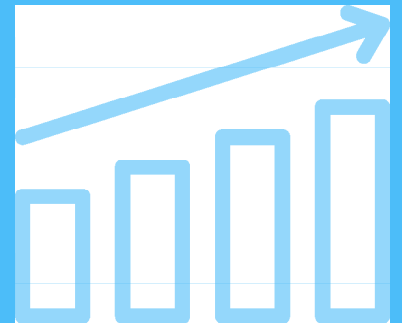




Corporate Overview

Join Our Next Decade of Growth





Why Symmetry?

- The ability to work for ourselves but not by ourselves
- A turnkey business model
- Culture of strong core values and leadership development
- Ability to scale our income, no caps on potential earnings
- Time and money freedom
- Omnichannel support from home office and your upline
- A recession resistant industry
- Meaningful and impactful work



About Us

Who is Symmetry Financial Group?

How do we do it?

How are we doing?

How do we find our clients?

How do we support our agents?

How do you get paid?

What makes Symmetry different?

INC. RANKED AMONG THE TOP 5000
FOR FIVE YEARS RUNNING

2016 | 2017 | 2018 | 2019 | 2020

VOTED TOP COMPANY CULTURE BY **ENTREPRENEUR** IN 2017 & 2018

Who is Symmetry Financial Group?

A Bit About Us

Symmetry was founded in October of 2009 by Brandon Ellison, Casey Watkins, and Brian Pope. We provide those who partner with Symmetry the opportunity to earn both time and money. We share the Wealth of Opportunity that exists in this multi-trillion-dollar industry.



Brandon Ellison



Casey Watkins



Brian Pope

Who is Symmetry Financial Group?

In 2020, Symmetry Financial Group and Asurea combined into the parent brand Quility.



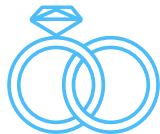
What We Do

We help families protect their largest asset:
their ability to earn an income.



How Do We Do It?

Protecting Life's Journey



Life

- Accidental Death
- Mortgage Protection
- Term, Universal & Whole
- Final Expense

Health

- Disability
- Dental
- Medicare Supplement
- Long Term Care
- Critical Illness

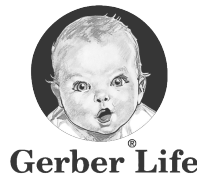
Asset Management & Wealth Strategies

- Debt Free Life®
- Annuities
- IULs
- Mortgage Acceleration
- SmartStart

Plus, group plans for employers!

How Do We Do It?

Partnerships with over 30 top-rated insurance carriers such as:



Is There a Need for Our Products?



≈**119** million households in the United States ¹

7 out of **10** households rely on two incomes ²

53% of foreclosures are caused by a death or disability ³

45% of Americans have nothing saved for retirement ⁴

The average funeral costs **\$10,000+** ⁵

Among Americans aged 65+, 21% of married couples and 45% of singles rely on Social Security for **90%** or more of their income ⁶

¹ US Census, 2019

² BTB Insurance Group

³ The Balance, 2020

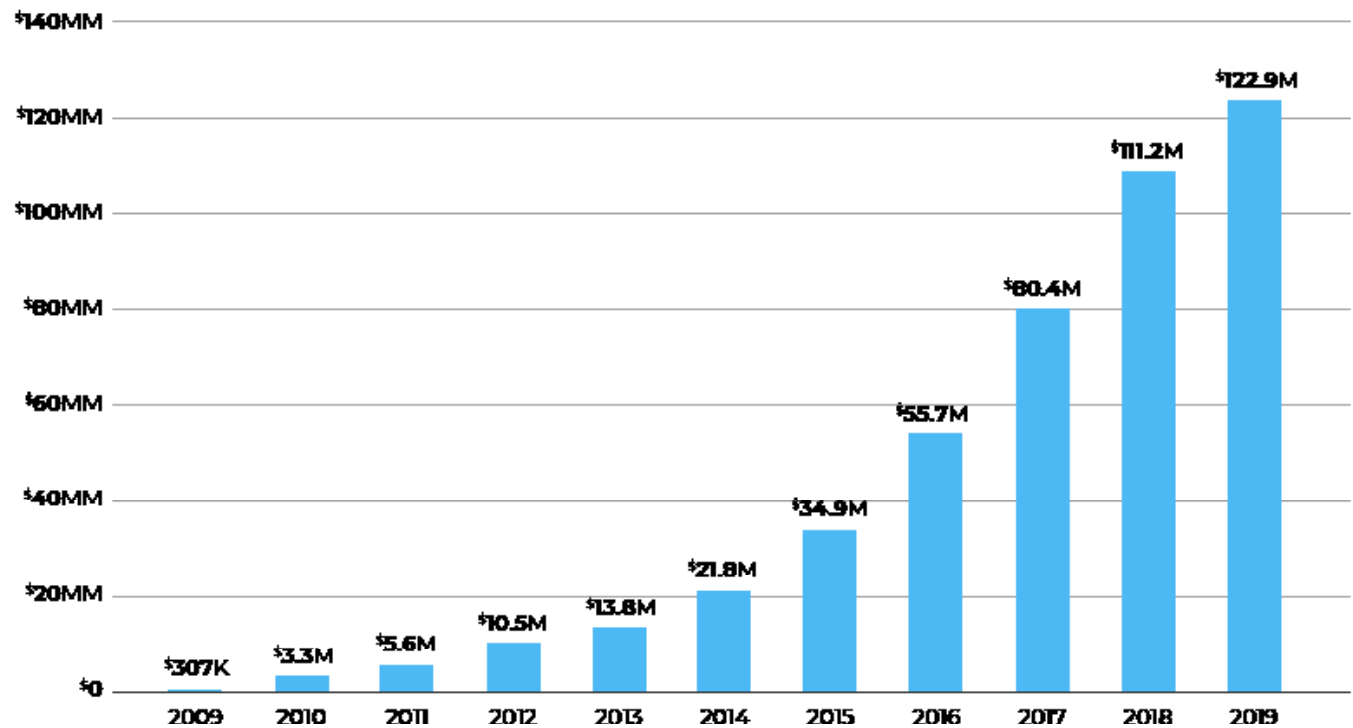
⁴ Statista, 2019

⁵ Parting, 2017

⁶ Social Security Administration, 2020

How Are We Doing?

Annual Submitted APV Comparison



How Are We Doing?

Symmetry Snapshot

\$398 million

in total premium

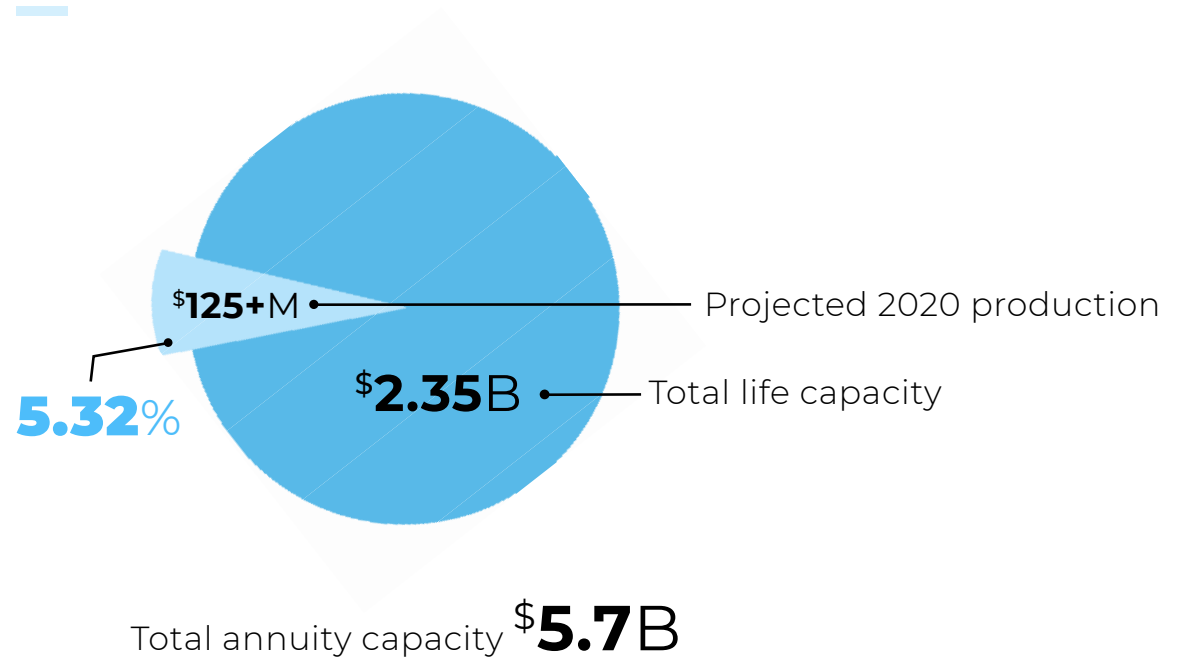
300,000+

families protected

\$30 billion+

in face amount

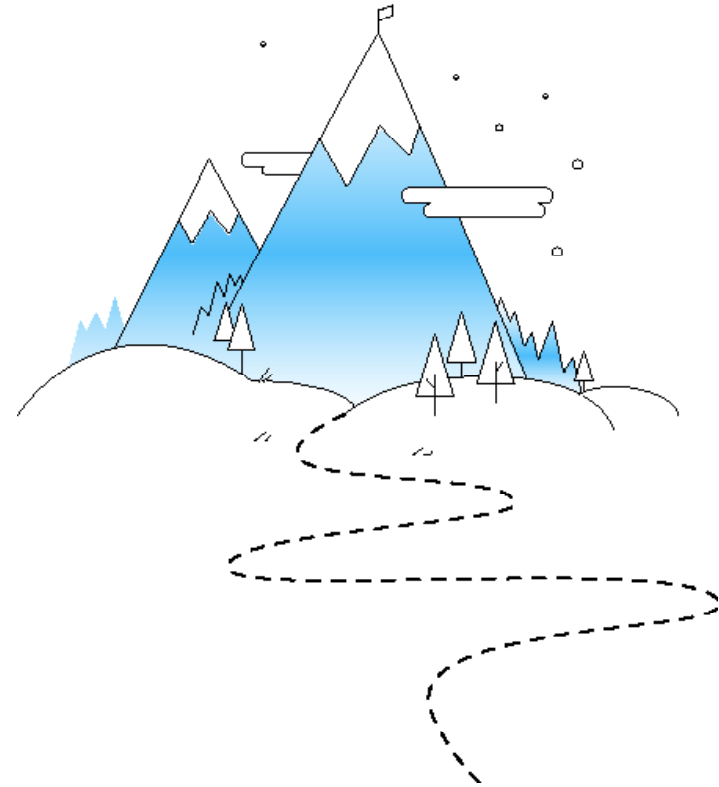
Capacity in Future Markets



Choose Your Path

The Owner Track

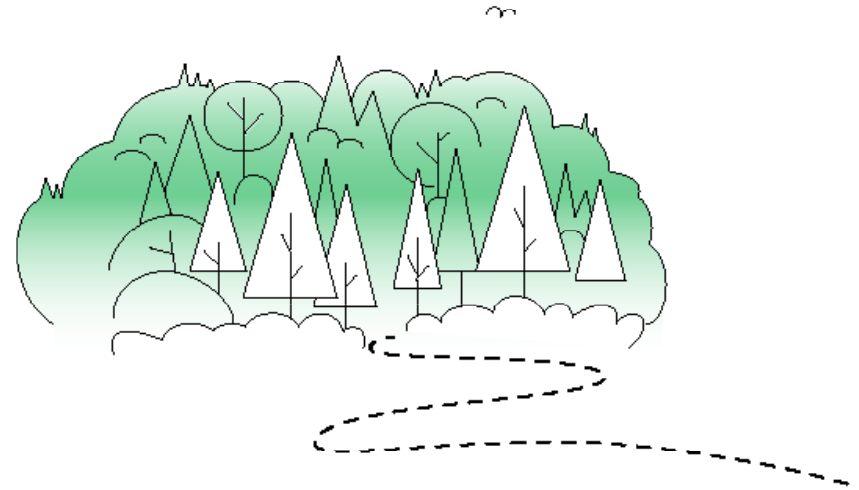
The Owner track is Symmetry's flagship path. As an Owner, you will be empowered with the support, training, and tools needed to be a successful agent and builder within Symmetry. The growth and success of your agency generates passive income for you and leads you to the ultimate balance of time and money.



Choose Your Path

The Producer Track

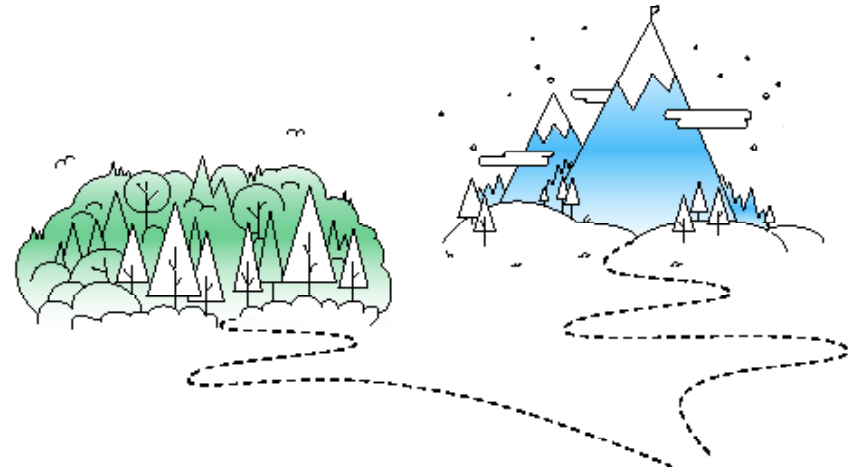
With the career agent in mind, your momentum and success on the Producer track is driven by the power of your pen. You will be equipped with best-in-class training, digital tools, and the most affordable leads in the industry to help you take your business to the next level.



Choose Your Path

Owner + Producer

- Choose your path system with the chance to achieve financial independence in 24 - 36 months
- Access to industry's top carriers and their product portfolio, and proprietary products including Debt Free Life
- Digital tools to drive leads and recruits
- The industry's only true agency ownership opportunity
- The most affordable and effective leads, with lead share costs from Symmetry
- Passive income opportunities with ongoing client engagement
- World-class incentive trips across the globe



How Do We Find Our Clients?



Leads

- Symmetry currently generates **10,000** leads every week on average.
- On average, **3,000** new leads are added to inventory each week after distribution, with over **1 million** in total bonus lead inventory.
- Our subsidized lead program provides options for every budget.
- Our goal is to put you in front of families that have requested your help.

Spend your time selling, not prospecting.

How Do We Find Our Clients?

Omnichannel Marketing Leads

	Search	Display	Social Media	Direct Mail
Mortgage Protection	✓	✓	✓	✓
Debt Free Life	✓	✓	✓	✓
Life	✓	✓	✓	
Final Expense	✓	✓	✓	✓
Recruitment	✓	✓		✓

Affordable Insurance

That provides financial security for your home + family.

[Let's Get Started](#)

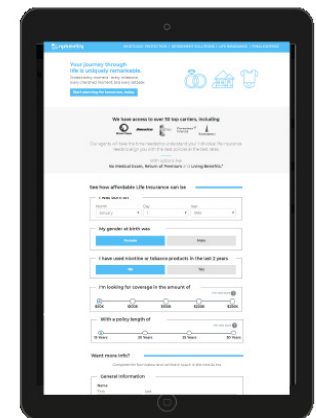
Debt Free Life

- ✓ 9 Years
- ✓ Debt Free
- ✓ Tax-free Savings

Don't let final expenses get in the way of goodbyes with **Burial Insurance**.

[Request a Quote](#)

We're hiring!
Join our team.





How Do We Support Our Agents?

Road Map to Success

Proprietary Sales System

Proprietary CRM + Lead Management

Marketing + Recruiting Assistance

Ongoing Support

- One-on-one mentorship
- Weekly training calls and webinars
- Local, regional and national training events

How Do We Support Our Agents?

Industry-Leading Insuretech Tools

OWNER'S CIRCLE



Create a custom website with the request-a-quote feature, a personalized domain, and email addresses for your team.

VIRTUAL ASSISTANT



A digital management tool to help you with lead allocation, key performance indicator tracking and agent level reporting.

VIRTUAL MENTOR



Empower your team with on-the-go access to a range of carrier and product resources to generate initial quotes, find best-fit products and close the deal.

POWER DIALER



Increase outbound productivity by 300-400% with a one-touch dialing system that helps you reach clients more efficiently.

How Do We Support Our Agents?

Leadership Development Program



Agent Perks

Protect the Protector



My Life Policy

- **Free** year of life insurance for all Symmetry agents*
- Up to **\$250,000** in coverage, up to **30-year** term

My Health Policy

- Obtain day-to-day and/or catastrophic health coverage at premiums that are **half the cost** of the marketplace

*For those who qualify

Powered by **QUALITY**

 **symmetry**
FINANCIAL GROUP



How Do We Support Our Agents?

Quility Member Services

- Symmetry agents receive the support of a team of certified agents, highly-trained in advanced market sales.
- Designed to drive ongoing engagement to forge long-lasting relationships with our clients and create **massive, passive income** for the originating agent.

How Do You Get Paid?

Promotion Guidelines

- Part-Time + Full-Time Positions
- 70%-120% Commission Levels
- Bonuses

3 Consecutive Months	\$225,000 45 Writers	120 MP CI FE 152 120 138	\$40,000	2 Consecutive Months Career Pro Only
	\$145,000 29 Writers	115 MP CI FE 152 120 138	\$35,000	
	\$95,000 19 Writers	110 MP CI FE 152 120 138	\$30,000	
2 Consecutive Months	\$65,000 13 Writers	105 MP CI FE 152 120 137	\$27,500	2 Consecutive Months
	\$45,000 9 Writers	100 MP CI FE 148 120 136	\$25,000	
	\$30,000 6 Writers	95 MP CI FE 146 120 135	\$20,000	
	\$15,000	90 MP CI FE 144 118 134	\$15,000	
	\$10,000	85 MP CI FE 142 118 133	\$10,000	
	\$5,000	80 MP CI FE 140 118 132	\$5,000	
	\$2,500	75 MP CI FE 138 118 131	\$2,500	
Owner Track Agency Volume	New Agent	70 MP CI FE 136 118 130	New Agent	Pro Track Producer Volume



How Do You Get Paid?

Part-Time Agent

15-20 hours per week

6 placed sales per month

70% contract level

\$1,000 in annual premium volume (*average per case*)

75% carrier advance

How Do You Get Paid?

Part-Time Agent



$$\begin{array}{r} \$6,000 \times 70\% = \$4,200 \\ \text{each month} \quad \text{commission} \end{array}$$

$$\begin{array}{r} \$4,200 \times 75\% = \$3,150 \\ \text{carrier advance} \end{array}$$

\$37,800
annual advance

\$50,400
total first year compensation



How Do You Get Paid?

Full-Time Agent

30-35 hours per week

15-20 placed sales per month

85% contract level

\$1,000 in annual premium volume (*average per case*)

75% carrier advance

How Do You Get Paid?

Full-Time Agent



$$\begin{array}{l} \$15,000 \times 85\% = \$12,750 \\ \text{each month} \quad \text{commission} \end{array}$$

$$\begin{array}{l} \$12,750 \times 75\% = \$9,562.50 \\ \text{carrier advance} \end{array}$$

$$\begin{array}{l} \$114,750 \\ \text{annual advance} \end{array}$$

\$153,000

total first year compensation



What Makes Symmetry Different?

Exclusive Agency Ownership Program

Symmetry provides agents with everything they need to build their own business through **true contractual ownership**.

You have the ability to earn both **time** and **money** with system-driven income

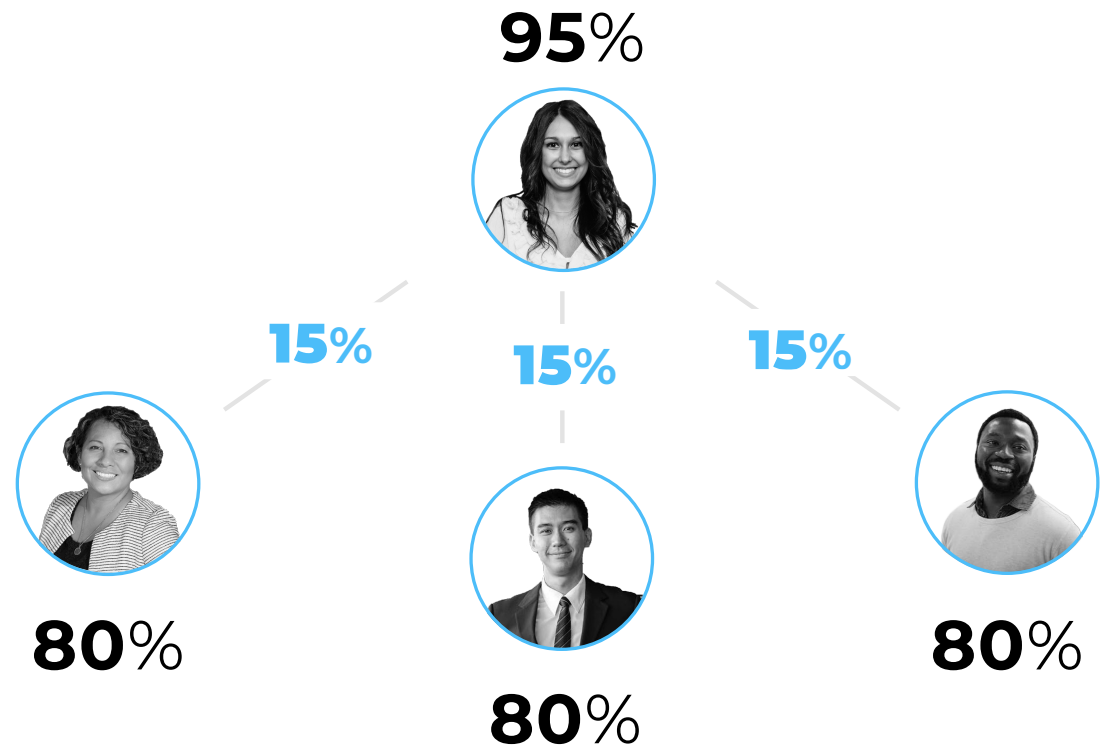
Capability to **pass on a business** that you've worked hard to build to a loved one

What Makes Symmetry Different?

Build Your Own Agency

As an agency builder, you make commissions every time you help an agent make a sale.

The difference between your contract level and your agents' is called "spread"



What Makes Symmetry Different?

Agency Owner | \$50,000 Agency

\$15,000 personal production at **95%**

\$35,000 agency production with an average **15%** spread

75% carrier advance

Agency Owner



What Makes Symmetry Different?

Agency Owner | \$50,000 Agency

\$15,000 Personal Production

$$\begin{array}{ccccccc} \$15,000 & \times & 95\% & \times & 75\% & = & \$10,687.50 \\ \text{each month} & & \text{commission} & & \text{carrier advance} & & \end{array}$$

\$35,000 Agency Production

$$\begin{array}{ccccccc} \$35,000 & \times & 15\% & \times & 75\% & = & \$3,937.50 \\ \text{each month} & & \text{commission} & & \text{carrier advance} & & \end{array}$$

$$\begin{array}{ccccccc} \$14,625 & \times & 12 & = & \$175,500 \\ \text{advanced commission} & & & & \end{array}$$

\$234,000 total first year compensation plus residual commission, when available!

What Makes Symmetry Different?

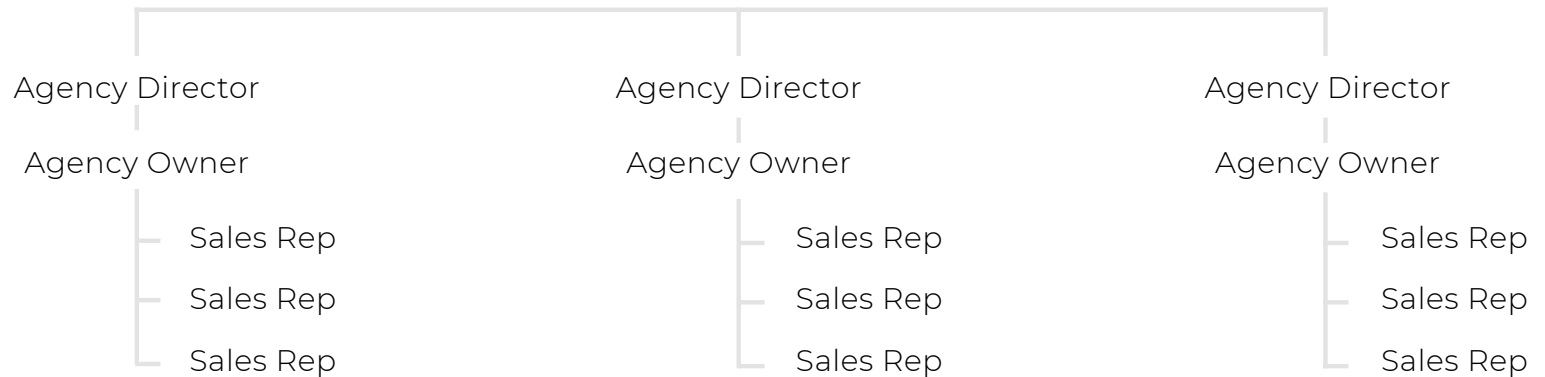
Executive Vice President | \$500,000 Agency

\$0 personal production

\$500,000 agency production with an average **15%** spread

75% carrier advance

Executive Vice President



What Makes Symmetry Different?

Executive Vice President | \$500,000 Agency

\$500,000 Agency Production

$$\begin{array}{ccccccc} \$500,000 & \times & 15\% & \times & 75\% & = & \$56,250 \\ \text{each month} & & \text{commission} & & \text{carrier advance} & & \end{array}$$

$$\begin{array}{ccccccc} \$56,250 & \times & 12 & = & \$675,000 \\ & & \text{advanced commission} & & \end{array}$$

\$900,000 total first year compensation plus residual commission, when available!

What Makes Symmetry Different?

Executive Vice President | Profit Sharing

SFG Equity Bonus of \$19,000 Per Month

(a bonus off the entire company, not just your organization!)

\$900,000 + **\$228,000**
annual bonuses

\$1,128,000

total first year compensation plus
residual commission, when available!

What Makes Symmetry Different?

Best-in-Class Bonus Programs | FastTrack Bonus + Carrier Kickers

Overall FastTrack Bonus opportunity for new agents is \$12,500 and a trip for two to the 2021 Symmetry Destination.

Bonus	Reward
FastTrack Bonus 30-day Sprint	\$1,000
FastTrack Bonus 90-day Hustle	Invitation to Symmetry Destination Trip (\$6,000 value)
Carrier Kickers 90 Days	\$1,000/carrier (up to \$4,000 total)
The Hat Trick 120 Days	\$5,000
The Grand Slam 120 Days	\$2,500

Agent Perks

Trips + Incentives

All-expenses paid vacations to incredible destinations worldwide sponsored by carriers and Symmetry.



Costa Rica



Athens



Iceland



Puerto Rico



London



Switzerland



Puerto Rico



Paris



Who Are We Looking For?

Listen

Actively listen! Take in the information from your mentor, audios, be coachable and be a student.

Associate

Attend events and plug into everything! SFG is caught, not taught. Counsel often and disassociate with negativity.

Work

Work hard and intelligently! Have hustle and the humility to ask how?

Change

Be willing to change and personally develop! "If we want different, we have to become different."

What's the Next Step?
