

April 15, 2021

Dear <Advisor>,

We are excited to announce that Dixon Wells has acquired Brokerage Services of Carolina. This acquisition opens an opportunity with an organization even better able to serve you in this rapidly changing marketplace.

Just like Brokerage Services of Carolina, Dixon Wells is committed to your success. As we work to integrate the book of business, be assured of their commitment to delivering the high level of service to which you are accustomed. The goal is to make this a seamless transition.

Dixon Wells offers a competitive portfolio of insurance products from the same select group of highly rated insurance companies you use now for traditional life, disability, LTC and annuity products. In addition:

#### **Underwriting Expertise**

Delivering a policy that meets your client's expectations is one of our key strengths. Underwriting resources that include direct access to reinsurance manuals, concierge carrier relationships, and automated underwriting tools, provide us with a competitive advantage in both small and large case underwriting. Our membership to the exclusive Risk Appraisal Forum provides select access to the medical directors from several top insurance companies.

#### **Technology Difference**

The Dixon Wells single sign-on website is a robust technology platform that provides tools necessary for advisors to maintain a competitive and knowledgeable advantage in the marketplace. Online resources include: an insurance quote engine that compares both permanent and term products; detailed carrier underwriting information; and a client management system that provides real time information on submitted and pending cases. In addition, if convenience is important, the DWEZ App is the easiest term application system in the industry.

#### **Experienced Team**

Dixon Wells has a team of professionals in seven (7) locations around the country to assist in providing the very best in service, product, and sales support. Our dedicated sales, case design and underwriting teams have extensive experience in the marketplace to meet your clients' diverse needs and provide solutions for insurance cases which may range from simple to complex. Our licensing, commission, and operations departments are structured to make the process easy from application submission to case issue.

We will continue to keep you posted on our plans for the integration and how working with Dixon Wells will benefit you. In the meantime, please take a moment to explore the Dixon Wells website (self-registration required) at [www.dixonwells.com](http://www.dixonwells.com). In addition, do not hesitate to contact me with any questions you may have.

Thank you for your continued support.

Bill Brook, Jr.