

What is RightBRIDGE?

RightBRIDGE is a cross-selling solution driven by a powerful suggestion engine that identifies all relevant sales opportunities for clients in a financial professional’s book of business. RightBRIDGE sifts through the entire client base and identifies the most compelling sales opportunities and most importantly presents them with detailed reason text™ explaining why each suggestion is relevant.

Why Is RightBridge Different – Reason Text

RightBRIDGE delivers unique reason text™ for each client explaining to the financial professional why a specific product meets a client’s needs, complete with all the detail and the selling points. These concrete reasons give the producer a level of comfort in approaching their client to have a valuable discussion about your products.

RightBRIDGE Benefits:

- Needs-based cross selling solution
- Provides client specific suggestions
- Provides detailed reasons why each suggestion makes sense
- Provides producer with concrete reason to call their clients
- Helps producers capture and act on life events
- Provides producer all the details they need to overcome call reluctance
- Generates call list by product opportunity type
- Improves client loyalty
- Can be embedded in portal or CRM

Why Addtl life for survivor needs?

Why Addtl life for survivor needs?		
<input type="button" value="Close All"/> <input type="button" value="Accept"/> <input type="button" value="Email"/> <input type="button" value="Follow Up"/> <input type="button" value="Add to Campaign"/> <input type="button" value="Not Interested"/>		
<input type="checkbox"/>	The client has 5 % of the recommended life insurance based on their age and income. The client's total life insurance is \$50,003 this is 5 % of the minimum recommended amount of \$1,000,000 using a multiple of 8 x the client's income based on the client's age and income.	+44%
<input type="checkbox"/>	2 dependant(s) under age 18 (Jimmy, Kate) Jimmy, Kate are age(s) 12, 8. A major consideration for life insurance is providing for dependants in the event of death.	+19%
<input type="checkbox"/>	The client may need an additional \$949,997 of insurance based on their age and income. The additional need of \$949,997 is based on current life insurance of \$50,003 compared to a recommended amount of \$1,000,000 using a multiple of 8 x the client's income based on the client's age and income assuming 3 dependants.	+14%
<input type="checkbox"/>	Assets or stated net worth are (\$1,189,561) The amount of a clients assets are a key indicator of a client life insurance needs. The client's Assets of \$1,189,561 are a positive indicator for this suggestion.	+10%
<input type="checkbox"/>	Client is age 55 The client's Age 55 is a positive indicator for this suggestion. The client's age is above 43 which is the highest level of relevance	+8%
<input type="checkbox"/>	The client's income is a positive indicator (\$125,000) The client's income is an indicator of a greater than average premium paying ability.	+5%

Example of the reason text™ provided by the RightBRIDGE System.

To Learn More or to Schedule a Demo

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“RightBridge is like having a compliance and product expert for every product working 24/7 in my office, constantly searching through all my clients, finding the ones with immediate needs and helping me build a sales plan for each of them. It’s a real time saver, and I’m building stronger relationships and closing more business than ever before.”

- Top Producing RightBridge User