



YOUR PARTNER IN GROWTH

Create the insurance business you've always envisioned



With PSM Brokerage, you gain a robust partner and a top-tier platform that supports you in remaining competitive, attracting and retaining talent, increasing your revenue, broadening your business goals, and safeguarding your legacy.



PROVEN TRACK-RECORD

A trusted partner for agents

“Our team is equipped with extensive knowledge and experience, and we are fully committed to providing the guidance, resources, and support you need every step of the way.”

➤ **Serving the Agent Community Since 2006**

Founded in 2006, PSM strengthens insurance agents and agencies by offering a tailored mentorship strategy for building enduring businesses.

➤ **Network of 30k Brokers**

Join our robust network of agents who rely on PSM for their product, technology and marketing support. Our hands on approach delivers a personalized and consistent experience every time.

➤ **Tenured & Experienced**

PSM has earned the reputation as one of the most agent friendly FMO's in the insurance industry. Our team of dedicated Account Managers has an average of **10+ years of experience** supporting agents and agencies.

THE PSM DIFFERENCE

Unlock the mentorship and tools to scale your agency



You deserve mentorship that guides you to scale your insurance business faster and smarter with proven strategies and dedicated support.



Personalized Guidance on Business Tools and Growth Strategies

Partner with a dedicated Account Manager for personalized support tailored to help you grow your business.



A Technology Platform to Help Boost Your Efficiency

Increase your sales with a top-tier platform that streamlines your workflow, so you can focus on closing more deals.



Customized Marketing to Enhance Your Brand and Expand Your Reach

Access a full-service marketing platform with custom materials, expert support, and campaign development to expand your reach and grow your business.

SOLUTIONS FOR TOP INSURANCE AGENTS

The solutions you need and the service you deserve

Gain access to quoting and enrollment platforms, expert marketing support and top products to keep your business growing.



"I needed more than just contracts—I needed a roadmap. PSM has been my go-to partner for scaling my business the right way."



Becky C, Licensed Agent

"Expanding a call center is challenging, but PSM gave us the strategy and support to make it happen seamlessly."



Scott R, Agency Owner

ROBUST PRODUCT SOLUTIONS

Build a trusted insurance portfolio that sets you apart

Offering the right insurance options ensures clients have the coverage they need for unforeseen expenses, providing them with the peace of mind they deserve.

- ➔ Medicare Solutions
- ➔ ACA Health Plans
- ➔ Life Insurance
- ➔ Annuities
- ➔ Ancillary



*At PSM, we pride ourselves on offering the **highest compensation levels** available in the industry.*

TOP-TIER CARRIER ACCESS

Top commissions from 70+ carrier partnerships

At PSM, our long-standing relationships with the industry's top insurance companies give our agents a unique advantage. These direct partnerships mean:

- **Direct Carrier Contracts**
- **Highest Compensation Levels**
- **Faster Response Times**
- **Exclusive Insights**
- **Unmatched Accountability**

Our commitment to these strong partnerships translates to better opportunities, smoother processes, and more success for the agents we serve.



From nationally recognized brands to specialized regional carriers, our diverse portfolio offers agents a wide range of top-tier options to best serve their clients.

Some of the trusted carrier partners we proudly represent

[View Portfolio](#)





INSURANCE AGENT PLATFORMS

Level up your insurance game with the right technology

Streamline operations and grow your business with a platform designed to support you, every step of the way.

- ➔ Compliant Leads
- ➔ Enrollment Platforms
- ➔ CRM Solutions
- ➔ Marketing Automation
- ➔ Referral Management

ITS TIME TO TAKE THE LEAD

More compliant, qualified prospects than any other platform



LeadStar offers a variety of options, including **inbound and warm transfer calls**, **real-time exclusive leads** that align with your demand, and aged leads—all at preferred pricing that ensures high quality and greater success for your business.

“The quality of the leads are hands down the best. I am consistently closing at more than 20%, which is unheard of these days.”



Rebecca T, Licensed Agent

EXPERIENCE LIGHTING IN A BOTTLE

Enrollment platforms that boost efficiency and drive growth



Medicare

SunFire simplifies the enrollment process, improves the quality of submissions, and offers agents numerous opportunities to connect with a broader audience.



ACA Health Plans

HealthSherpa streamlines the ACA enrollment process with a platform offering an intuitive interface, detailed plan comparisons, fast enrollment options.

DISCOVER THE AGENCYBLOC ADVANTAGE

A CRM solution for all your insurance needs



AgencyBloc is an agency management system that helps life and health insurance agencies grow their business with an industry-specific CRM, commissions processing, and integrated business and marketing automation.



“AgencyBloc's workflows and sales pipeline have greatly improved my agency, saving me time and ensuring that no tasks are overlooked.”



Tim P, Licensed Agent

MARKETING OUTREACH DONE FOR YOU

Bring the power of online marketing to your business



AgentMethods®

Increase Insurance Sales, Retain Clients, and Generate Referrals.

AgentMethods is a marketing platform tailored for independent agents looking to grow their businesses. AgentMethods is a fully automated platform that helps you reach a wider audience and keep your raving fans around for longer.

With AgentMethods, you can deliver valuable and relevant content to your current customers. Additionally, you can attract and nurture new clientele while boosting referrals and policy renewals.



ACQUIRE MORE TARGETED CLIENTS

Automated referral marketing software

REFERME

IQ

Automated referrals make it easy to generate more business from client referrals and your personal network. **ReferMe IQ**'s Automated Referral Intelligence goes far beyond the basic mass email and SMS platforms and best of all – it is easy to set up!

PSM Marketing Hub

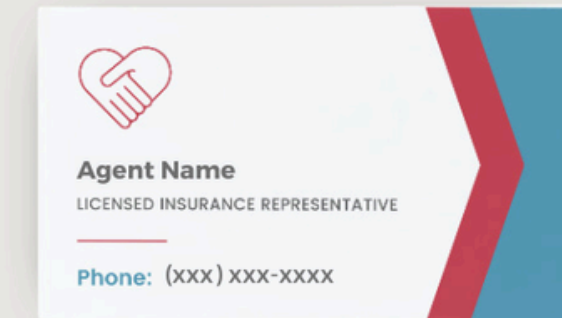


Your one-stop-shop for
customized marketing materials



WE'VE GOT YOUR BACK

Polished, professional and compliant



Marketing materials customized for you by our in-house design team will help save you time and money while increasing acquisition and retention.

We can assist you in reaching the right audience, making it easier to find and build lasting relationships.

WHAT AGENTS ARE SAYING

"From logo and company branding to customized marketing materials, PSM has improved my marketing game while saving me time and money. Having access to their creative team has been a huge value to my agency."



Cameron B, Agency Owner

HIGH QUALITY EXPERTISE

Marketing made easy



YourMarketingSupport has evolved beyond digital solutions to offer a full spectrum of marketing services. From strategy and creative development to execution across all channels, we're here to support every aspect of your marketing needs.



Your Marketing Support delivers high-quality marketing services at a fast pace and low cost, with dedicated support from our expert marketing managers.

- **Digital Marketing**
- **Podcast & Radio**
- **Content & Copywriting**
- **Video Services**

ESSENTIAL LEARNING FOR AGENTS

Empower your agency with knowledge and insights



Stay ahead with the latest insurance education insights and resources, giving you the knowledge to better serve your clients and grow your business.



How-to Guides

Our comprehensive how-to guides provide agents with step-by-step strategies for lead generation, marketing, sales, and technology, making it easier to grow your business.



PSM Learning Center

Keep up with relevant topics in the insurance industry and get reminders on everything you need for enrollment periods, certifications, and everything in-between.



Agency Growth Resources

Actionable steps and strategies to help agents successfully scale their business, focusing on marketing, leveraging technology, hiring strategies, lead generation, and client retention.

An aerial photograph of a large, modern arch bridge with a prominent orange-painted steel structure. The bridge spans a wide river with clear blue water. Several cars are visible on the bridge's roadway, and a small boat is in the water below. The background shows a lush green shoreline with trees and a road with more vehicles. The overall scene is bright and clear, suggesting a sunny day.

Driving agent success through partnership and innovation

At PSM Brokerage, our mission is to empower insurance agents with the tools, resources, and support needed to build a thriving business. With a focus on integrity, innovation, and agent success, we strive to create lasting partnerships that drive growth and deliver exceptional value.

CHOOSE WISELY

Choosing the right partner is key to your success

PSM goes beyond the basics to give agents a true competitive edge. **Does your FMO offer the following?**

- ➔ Open Release
- ➔ Downline Protection
- ➔ Compliance Support
- ➔ Agency Reporting
- ➔ Co-Op Support
- ➔ Acquisition Strategies



*Our team provides **certification, ready-to-sell and production reports** for agencies upon request.*



Company achievements



Top Performing Agency



Best in Class Top Performer



Circle of Excellence



Top Performer MAPD Sales

Since 2006, PSM Brokerage has been committed to excellence with a “**do the right thing**” approach. Our success is driven by the agents we serve—Together, we elevate standards, drive innovation, and create lasting impact in the insurance world.

- Network of over **30k** brokers
- Over **400 thousand** Medicare advantage applications written
- Over **200 million** in Medicare Supplement premiums written
- **5** Amerilife Hall of Famers



Maximize your agency's growth and potential

Experience unparalleled support in the industry and see how it can elevate your business today.

(800) 998-7715

[Book a Meeting](#)



Federico Guardia
President



Lucas Vandenberg
CEO / Partner



Jeff McCright
Vice President of Sales



Greg Segovia III
Executive Account
Manager



Frank Ragsdale
Executive Account
Manager