



# CPA Alliance Program

The mission of the CPA Alliance Program is to create strategic alliances among elite insurance professionals and CPAs.

## How does the program work?

Through the CPA Alliance Program, we offer an opportunity to educate and work with CPAs to enhance their practice and your business.

## What are the benefits?

If you qualify to participate, you have an opportunity to introduce yourself to CPAs and explain how CPAs can expand their practices to include insurance products and/or services. You'll also learn how to create a Wealth Management Team to provide your clients and their clients with outstanding customer service and insurance products.

## What are the participation requirements?

If you have written \$1 million in Annuity Business or \$100,000 of Life business in the previous six months and you contract with URL's core annuity carriers you will be eligible to apply to participate in the program. A special training program will also be required.



For more details about the CPA Alliance Program, please call  
URL Insurance Group - One Stop Brokerage at 800-926-8875.