



KARMA FINANCIAL

LEAD FLOW



*Helping Clients
reach their
financial goals.*

KARMA FINANCIAL

ADVANCED CLIENT LEAD SYSTEM

Financial Services has a massive need for lead management and client acquisition. A larger portfolio for financial agents means more business, and often time the process of prospecting clients can become more important than the education of the products themselves.

Karma Financial allows insurance producers to grow their client portfolio faster than ever with our turn-key lead system. We use the most advanced and proven systems to allow our agents direct access with clients.

Placing agents in direct contact with qualified clients is something we take very seriously, and pride ourselves on. Karma Financial's in house lead system allows direct control of your leads and gives you a deeper understanding of your client before you even meet them.

Agents are able to work a variety of different leads in all states. Agents have direct access to the inventories and once leads are assigned the lead is never resold or shared.

LEAD OPTIONS



Our large selection of exclusive leads gets our agents more clients than any other financial services firm. We work with qualified clients for quantified results.

DIRECT MAIL

Fresh from the mailbox

Handwritten Mail

Our exclusive mailhouse allows agents to work with fresh inbound clientele.

DIGITAL LEADS

Client Driven Leads

Internet Driven Leads

Real-Time Leads delivered to agents as clients fill out information online via Google Ads and Facebook Ads.

TELE-LEADS

Live voice-transfer leads

Exclusive Leads

Tele-leads offer agents to work high-response clients with verified responses

AGED INVENTORY

In-house inventory

KFG Inventory

Karma Financial owns a large list of aged leads, which allows agents to work inexpensive and quick leads.

NOTE: Lead availability and amounts vary based on location and distribution

WHY WE BELIEVE IN LEADS OVER COLD-CALLING.

Learn how leads change Financial Agent's lives

Many financial services specialists spend a great deal of time prospecting clients or finding the proper vendor. These things not only cost time but money when they don't work out. At Karma Financial, we want to ensure our agents are focused on educating our clients and helping them protect what's important to them. That's why we take the liberty to generate our own in-house lead system .

Karma Financial works with various client acquisition vendors not only to alleviate the burden of prospecting that agents must go through but to also alleviate the process for clients to find qualified agents.

There are a multitude of clients on the market that have a limited understanding of how they can protect their loved ones and financial stability if something were to happen. Our lead system works to target these clients who are qualified for the product by demographics but also who need the right help.

We all know the traditional model is broken and therefore we allocate resources to find agents the best leads on the market. As a result, we have some of the top producers of the industry due to their ability to focus on helping the client over finding the client.