



Brokers Alliance

FAMILY OWNED SINCE 1982

A WHITEPAPER FOR INDEPENDENT AGENTS, ADVISORS AND THE AGENCIES,
IMOS, BGAS AND FMOS THAT WORK WITH BROKERS ALLIANCE
PUBLISHED 10-02-26

— HOW WE USE DATA AND AI

Run on data you can check: how Brokers Alliance uses dashboards and AI for the independent agents, advisors and agencies it serves

How we use data and automation, what changes for an independent agent on Monday morning, and which of our statements you can check, which you can test, and which we simply sign our name to.

ONE PAGE

Six sections, one close, and four kinds of statement, each one labelled.

Every claim in this paper is one of four kinds, and the label tells you how to treat it: open it, read your contract, try it yourself, or hold us to our word. A commitment is never dressed as something you can test.

THE FOUR KINDS OF STATEMENT

- **Published statement.** A page we signed. It proves who said it, not that the operation performs. Open the page.
- **Contractual entitlement.** What your contract says. The contract is the source; this paper only points to it.
- **Tested behaviour.** Something you can do and watch. Use the product. Ask the connection a question it must refuse.
- **Commitment in David's name.** True, private, and not checkable from outside. Labelled as such, with one sentence on why it stays private.

THREE LABELS ON ANYTHING THAT IS A SYSTEM

- **DATA** says whether we hold the record: live, partial, or not held.
- **ACCESS** says who may see it: by the contract, approved for a principal, pending a ruling, or out.
- **SCREEN** says how it reaches you: live, pilot proven, by the connection, or concept. A concept is a drawing of a screen that does not exist yet, and it is always marked.

"We hold the data" and "you may see it" are different questions. A screen is live for you only when all three labels say so.

01 What data-forward means here, and what it does not

The definition and the not-list, as the site prints them, signed.

PUBLISHED STATEMENT

● LIVE

02 We publish what we measure, not what we promise

The service standard as an outer limit; the averages we do not publish; who resolves a discrepancy.

PUBLISHED STATEMENT

● LIVE

03 The technology provided with the contract

MyAdvisorCloud, MyAdvisorGrids, RetirementBrain, LifeBrain, automated contracting. The contract is the source.

ENTITLEMENT

TESTED BEHAVIOUR

● LIVE

04 AI in our back office, and the line it does not cross

Automation drafts, sorts, flags and reminds. A person makes every case change and sends every transaction.

PUBLISHED STATEMENT

COMMITMENT

● BUILD ITEM MARKED

05 MyAdvisorData: your hierarchy, your assistant, read-only

A read-only connection for a hierarchy owner, in testing on a hierarchy we own. By invitation.

TESTED, BY INVITATION

● PILOT

06 What we commit to in David's name

Daily review by people, the lead-filter replay, the business-quality pattern review. Private by rule.

COMMITMENT

● LIVE, PRIVATE

CHECK IT YOURSELF, TODAY

Open brokersalliance.com/llms.txt, the plain-text description of this company that any assistant can read.

READ THE STRUCTURED DATA

View the source of any page on brokersalliance.com and read the structured data it carries.

FIND THE NAME

Scroll to the bottom of any regulated page and read who signed it. If you cannot check a claim yourself, this paper labels it a commitment and names the person who signs it.

SECTION ONE

What "data-forward" means here, and what it does not.

PUBLISHED STATEMENT

● LIVE, PUBLIC, SIGNED

A data-forward distributor runs its own operation on data and automation it built and monitors, with a named person accountable for every regulated decision, and it lets a hierarchy owner connect their own assistant to their own data on their own terms. That is the whole definition. At Brokers Alliance the last part is a pilot, by invitation; the rest runs today. It describes how this company works. It is not a category, a badge, or a claim about anyone else.

THE NOT-LIST, AS THE SITE PRINTS IT

- **No suitability verdicts.** Suitability is yours.
- **No policy health scores.**
- **No product recommendations.**
- **No case changes.** Nothing in the connection changes a case.
- **No transactions.** Nothing in the connection sends one.
- **No contact with a hierarchy's downline agents** by Brokers Alliance.

Read-only means the connection can change nothing. It is not a claim about what any assistant vendor keeps; that is between you and the assistant you choose.

THE DECISIONS A PERSON OWNS, NAMED

"Every regulated decision" is a slogan until the decisions are listed. At Brokers Alliance a named person, not software, does each of these:

- **Case changes.** Anything that alters a case record, a requirement, or an appointment.
- **Transactions.** Anything sent to a carrier on a producer's behalf.
- **Compensation.** Anything that touches a commission, a grid, or a level.
- **Regulated copy.** Anything published about a product, a commission, a carrier, a valuation or tax. Drafted with tools, read line by line, signed by name.
- **What is said to a producer about a product.**

WHAT IT IS NOT

Not a chatbot on a website. Not a slide that says AI. Not software that acts on a case for you. Not a distributor reaching past you to your downline.

WHAT YOU CAN OPEN NOW

The AI hub at brokersalliance.com/ai and the definition at [/ai/what-an-ai-enabled-bga-is](https://brokersalliance.com/ai/what-an-ai-enabled-bga-is), each reviewed and signed by David Racich, published 09-08-26.

THE THREE CHECKS

/llms.txt; the structured data in the source of every page; the signer line at the foot of every regulated page. Live and signed, as of the date on this paper.

Kind of statement: published, signed. It proves attribution. The sections that follow say which parts you can test and which you take in David's name.

SECTION TWO

We publish what we *measure*, not what we promise.

PUBLISHED STATEMENT

COMMITMENT: THE CADENCE

● LIVE

A standard we commit to and an average we have not verified are two different kinds of claim. The page at brokersalliance.com/service-standards keeps them apart, and so does this one.

THE STANDARD THE DESK WORKS TO

Stated as the outer limit we hold ourselves to, not as a typical-case time. It is what a producer can hold us to on the days when a great deal is moving at once.

- **New applications** are processed within one business day from receipt.
- **Emails** are worked and returned within one business day.
- **Voicemails** are returned the same day when they reach us during working hours.

WHAT WE DO NOT PUBLISH

No advertised turnaround averages, no placement rates, no decline percentages. A typical-case number varies by carrier, product and case, and we have not sanctioned those averages for publication. They stay internal until we can publish them against our own data.

If another distributor advertises a typical turnaround, ask to see the measurement behind it.

FOUR THINGS THIS PAGE KEEPS SEPARATE

THE TARGET	The standard above. It is the commitment, and it is published.
WHAT WAS OBSERVED	Measured in our own case-management data, last measured in August 2026. The measurements, what is tracked and from which records, are published on the standards page and not repeated here; this paper carries no figures by rule.
THE REVIEW CADENCE	"Daily" means business days, over the open-requirements queue. Case status, requirements and appointment progress are reviewed by a dedicated case-management team, people, each business day. The internal dashboards and the daily case-management report exist; they are described here, not shown.
WHEN A CASE BREACHES	The case manager named on the case owns it until it is back inside the standard, and that person is who you call.

HOW FRESH IS A STATUS

Some carriers feed us case status automatically. Others are entered by our data team on a schedule. Which carriers do which is a sales conversation, not a page. A timestamp on an answer means "retrieved then". It does not mean "the carrier updated then".

WHO RESOLVES A DISCREPANCY

The case manager named on the case. Not a form, not a queue, not the software. If what you see in MyAdvisorCloud and what the carrier tells you disagree, that person reconciles it and tells you which was right.

DATA	Held, in our case-management data
ACCESS	Internal; a producer sees their own cases in MyAdvisorCloud
SCREEN	Internal dashboards described, not shown
KIND	Published statement for the standard; the cadence is a commitment, restated in section six

SECTION THREE

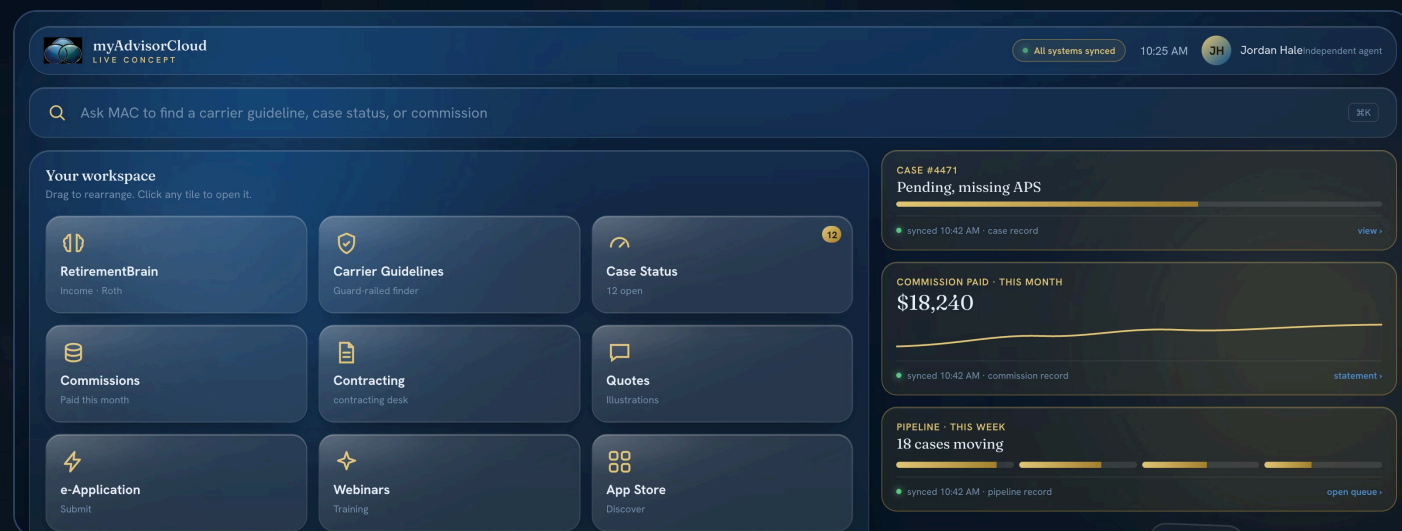
The technology provided with the contract.

ENTITLEMENT

TESTED BEHAVIOUR

LIVE PRODUCTS

None of this is new. It is the in-house technology provided to every contracted producer, built by an in-house team led by a technology-focused owner-operator, and handed over with the contract. None of it is required. Use what is useful and ignore the rest.



Concept screen, fictional data. The myAdvisorCloud direction: one workspace, your tools as tiles, an intelligence rail that names its source and when it synced.

DATA: FICTIONAL

ACCESS: PER THE CONTRACT

SCREEN: CONCEPT



Concept screen, fictional data. Case status, one panel.

SCREEN: CONCEPT

01 MyAdvisorCloud

One login to quoting, case status, compensation grids and sales tools.

02 MyAdvisorGrids

The commission grid, read before you contract rather than quoted on a call.

03 RetirementBrain

Retirement income planning and illustration.

04 LifeBrain

Life quoting, engineered by Brokers Alliance.

05 Automated contracting and onboarding

Paperwork through a system we built; appointments processed in house.

THE TERMS, AND WHERE THEY LIVE

Provided to contracted producers at no monthly charge, with no fee to contract, as of the date on this paper. The contract is the document for entitlement and for any conditions, such as appointments and activation. This paper points to it and does not summarize it.

DATA	Held
ACCESS	Per the contract
SCREEN	Live products; the screens above are the concept direction, not the product as it ships today

What you can test: the product itself. Sign in, read a grid before you contract, run a quote, follow a case.

Built, not bought: we measure our own service in systems we wrote, so the measurements are ours to publish and to defend. **What you can open:** [brokersalliance.com/myadvisor](#) · [/ai/for-independent-agents](#) · [/ai/how-we-use-ai](#) · [/about-brokers-alliance/why-partner-brokers-alliance](#), and the product itself, which a contracted producer signs in to under the contract's conditions. **Kind of statement:** contractual entitlement for the terms; tested behaviour for the product. The contract, not this paper, is the source of the entitlement.

SECTION FOUR

AI in our own back office, and the line it does not cross.

PUBLISHED STATEMENT

COMMITMENT

● SIGNED

"Automation drafts, sorts, flags and reminds. It does not decide."

David Racich. And because "does not decide" never stands alone, here is the boundary in plain actions: a person makes every case change, sends every transaction, and handles anything that touches a commission. A person reads every line of a regulated page and signs it by name.

WHAT THE SOFTWARE DOES

Routes and checks

An inbound inquiry is routed by software, which checks whether we already hold a record for the caller and puts the item in front of the right person.

THEN

A person takes it

Routing and queueing are the software's work. The conversation, the judgement and anything regulated are a person's.

WHAT ONLY A PERSON DOES

Changes, sends, signs

Case changes. Transactions. Anything touching a commission. Regulated copy, drafted with tools, read line by line, signed by name.

DATA Our own inbound and case records

ACCESS Internal

SCREEN Internal, described, not shown

KIND Commitment in David's name; the signed page proves who said it

HOW A PAGE GETS ONTO THE SITE

Regulated content on brokersalliance.com, anything about a product, a commission, a carrier or a case, is reviewed and signed by a named person before it is published, and the name is on the page. Drafting tools are used in the writing, as they are across the operation, and the same rule applies: the tool drafts, a person reads every line, and that person's name goes on the result. A regulated page without a name on it is a defect; the contact page is the way to report it.

● BUILD

DATA: PARTIAL

ACCESS: SALES TEAM, WHEN BUILT

SCREEN: NOT YET

Suggested follow-up order

A suggested order for a salesperson's follow-ups is being built. It will suggest; the salesperson decides who to call. It does not exist yet, and this paper says so.

What you can open: brokersalliance.com/ai/how-we-use-ai, reviewed and signed by David Racich, published 09-08-26; and the press release distributed 09-14-26 under the title "Brokers Alliance Publishes What Its AI Does Not Do". **Kind of statement:** both are our own statements, so they prove attribution, not performance. The routing and the human boundary above are commitments in David's name, and section six restates them as such.

SECTION FIVE

MyAdvisorData: your hierarchy, your assistant, *read-only*.

TESTED BEHAVIOUR, BY INVITATION

COMMITMENT

PILOT

A BGA principal points the assistant they already use at the cases and contracting packets their hierarchy places through Brokers Alliance. You bring the assistant. We bring the data your hierarchy already owns. We are not in the conversation.

PILOT · ILLUSTRATIVE EXCHANGE · NAMES AND TIMES ARE FICTIONAL

DATA LIVE

ACCESS APPROVED

SCREEN: BY THE CONNECTION · PILOT PROVEN

Which of my cases are waiting on requirements?

Insured M.R., attending physician statement, ordered. Insured T.L., signed illustration, requested.

Source: our case record · retrieved 09-30-26 7:02 PM ET

What commission level is my agent on?

Commission levels are outside this connection. Grids stay where they are today, in MyAdvisorGrids.

Refused · nothing retrieved

Status on a case that is not ours?

No case with that reference exists in your hierarchy.

The same answer a case that does not exist receives

CONCEPT SCREEN · FICTIONAL DATA · THE ANSWERS BEHIND IT ARE THE PILOT'S

DATA LIVE

ACCESS APPROVED (CASE STATUS)

SCREEN: CONCEPT · LIST VIEW

OPEN CASES · 118 · SORTED BY LAST CHANGE

CASE	AGENT	CARRIER · PRODUCT	INSURED	STATUS	PREM	OPEN REQS	LAST CHANGE
A10959	D. Okafor	Harbor Mutual · Income Advantage IUL	W.	Awaiting requirements	\$14,200	2	09-24
A10822	M. Vasilou	Granite Assurance · Max Accumulator+ III	R.	Pending decision	\$9,600	0	09-24
A10685	R. Whitfield	Meridian Life · Pathsetter	K.	App. submitted	\$7,150	1	09-23
A10548	S. Nakamura	Pinecrest Life · Builder Plus IUL 4	L.	Approved	\$18,000	0	09-23
A10411	J. Brandt	Summit Life · FFIUL	P.	Awaiting requirements	\$5,400	3	09-22
A10274	D. Okafor	Cobalt Annuity · Accumulator IUL	T.	Issued - delivery req.	\$24,000	1	09-19
A10137	A. Tremblay	Harbor Mutual · Term Life Express	G.	Unknown or incomplete	\$1,180	n/a	08-2025 · status frozen

The last row is deliberate: a case whose status has not moved in twelve months is shown as unknown, never as clean. A source outage or a row cap shows the same way, with its reason.

Concept screen, fictional data. The case desk a principal would read; today the connection answers the same questions by case id. Insureds by initial; one deliberate unknown row.

DATA LIVE

ACCESS APPROVED

SCREEN: CONCEPT

WHAT YOU CAN TEST, AS A CONNECTED PRINCIPAL

- Ask about a case that is not yours: **refused the same way as a case that does not exist.**
- Ask for a commission level. **Refused.** Grids stay in MyAdvisorGrids.
- Read what the connection returns: each answer carries its **retrieval date** or says the source does not hold it; a refusal says nothing was retrieved.
- Ask it to change anything: **refused.** It reads case status, open requirements and contracting progress, nothing else.

KIND Tested behaviour, by invitation

WHAT WE COMMIT TO, IN DAVID'S NAME

- A **revocation** takes effect on the next request; it cannot recall an answer already delivered.
- We keep a **request record**: the name of the question asked, the identifiers in it, the user and the time. We do not keep the words typed to the assistant.
- Scope is set by the **sign-in on our side**, never by what the assistant asks for.

WHAT THE VENDOR CONTROLS, NOT US

Whether it repeats the date, what it keeps after access is revoked, what it does with an answer. Read its terms as you would a carrier contract.

KIND

Commitment; the written terms are set per hierarchy
Authorization and logging run inside our systems; a page about them would describe them, not prove them

WHY PRIVATE

STATUS AS OF 10-01-26

In testing on a hierarchy we own; we are inviting the first outside hierarchy. Built for the assistants a principal already uses; proven only where this paper says so.

WHO GRANTS AND WITHDRAWS ACCESS

The principal, by named user. The principal's downline agents have no login until the principal turns them on; the principal's answers cover the whole hierarchy. The first outside user accepts an agreement before the first answer.

WHAT YOU CAN OPEN

brokersalliance.com/ai/for-bga-principals and [/ai/join](https://brokersalliance.com/ai/join), the invitation form.

THE SCREENS

What a principal would see, drawn honestly.

Two concept screens, each built on the same read-only connection and labelled the same way. Every number and name in them is fictional. The controls in the upper one run in the pilot today; the screen that shows them does not exist yet.

PILOT CONTROLS · CONCEPT SCREEN · FICTIONAL NAMES

IN THE PILOT TODAY · THESE CONTROLS RUN ON THE LIVE CONNECTION · NAMES BELOW ARE FICTIONAL


MyAdvisorData.ai

Principal: J. Northline (fictional) · 3 named users · downtime logins: off

Production
Case desk
Contracting & licensing
Placement operations
Ask your assistant
Access & audit

Your hierarchy stays yours. You decide who sees it.

Permissions are enforced on the Brokers Alliance side, not by the screen and not by the assistant. A request for a broader scope is refused there, whatever asks for it. Any screen built later reads through the same scope check and the same ledger.

DATA LIVE ACCESS APPROVED

BY THE CONNECTION · PILOT PROVEN

NAMED USERS

USER	ROLE	SIGN-IN	STATUS
J. Northline	Principal	work account	Active
P. Aldridge	Office · contracting	work account	Active
E. Duval	Office · case follow-up	work account	Revoked 09-19

Downline agent logins
Off
until the principal names them

Scope
1 hierarchy
the hierarchy code agent set, refreshed daily 06:30 UTC

TESTED 09-08-26 PILOT PROVEN

FAILS CLOSED, BY DESIGN

- A hierarchy relationship ends, or a hierarchy code is retired: every answer becomes "hierarchy retired" at the next daily refresh, and the connection fails closed.
- A foreign case id and a nonexistent case id return the identical answer. The system does not confirm what exists outside your book.
- A timeout, a row cap, a source outage: the answer says unknown or incomplete with the reason. Never an empty success.
- Every SQL the server runs opens with your agent set in the filter. A projection that touches a grid or level column fails the build.

DATA LIVE ACCESS APPROVED BY THE CONNECTION · PILOT PROVEN

REQUEST LEDGER · WHAT HAS BEEN ASKED

WHEN	USER	QUESTION	SERVED	OUTCOME
09-25 6:41 PM ET	J. Northline	open_requirements · A10959	snapshot · 0.3 s	found
09-25 6:40 PM ET	J. Northline	case_status · A10959	snapshot · 0.2 s	found
09-25 2:02 PM ET	P. Aldridge	contracting_progress · agent A10000	snapshot · 0.4 s	found
09-24 9:15 PM ET	P. Aldridge	case_status · A11096	live · 71 s	none recorded
09-24 12:30 PM ET	E. Duval	initialize	n/a	rejected · revoked

The principal sees this same ledger through the connection ("what has been asked"), Brokers Alliance holds the question class, the ids, the user, the time and the outcome. It does not hold the conversation.

Concept screen, fictional data. Named users, downtime logins off until the principal turns them on, one hierarchy of scope, and the request ledger a principal can read: which question, the identifiers, the user, the time, the outcome. Never the conversation.

DATA LIVE

ACCESS APPROVED

SCREEN: CONCEPT DRAWING OF PILOT CONTROLS

Ask MAC · carrier guideline finder

Retrieval only. It scopes carrier, product, and state first, then cites the exact document. It does not advise.

CARRIER
PRODUCT
STATE

Select...
Select...
Select...

e.g. diabetic underwriting, cannabis use, cancer history

☐ Simulate a low-confidence match

Find the guideline

Concept screen, fictional data. A guard-railed finder in myAdvisorCloud: carrier, product and state are chosen, then it cites the exact document. Retrieval only. It does not advise, and when it is not sure it says so and hands back the search.

SCREEN: CONCEPT

HOW TO READ EVERY SCREEN IN THIS PAPER

- Green band:** the controls or answers behind the screen run in the pilot today, proven on a hierarchy we own.
- Gold striped band:** a concept. The screen does not exist; it is a drawing of what the connection already answers.
- Three chips** on each: whether we hold the data, who may see it, and how it reaches you.
- Fictional data** everywhere: names, carriers, amounts and identifiers are invented for the drawing. No producer, insured, carrier amount or record of ours appears.

Signer: David Racich, President and CEO, Brokers Alliance, Inc. · Published 10-02-26

08

SECTION SIX

What we commit to in David's name.

OPERATIONAL COMMITMENT

● LIVE INTERNALLY · PRIVATE BY RULE

These are true, they run, and you cannot check them from outside. We would rather say that plainly than dress a commitment up as a page you can open. Each one carries David Racich's name and the date on this paper.

a

Open requirements are reviewed daily, by people, against the published standard.

Business days, over the open-requirements queue. The software keeps the record current and puts open items in front of the case-management team. The people work the case.

DATA Held, our case-management data
ACCESS Internal; your own cases in MyAdvisorCloud
SCREEN Internal, described

b

A lead filter is enforced only after a replay over our own records shows what it would have held.

Before a rule may hold an inbound inquiry, it is run over our own history and we read what it would have caught. The replay changed the filter: the first version would have held real agencies' shared mailboxes and toll-free numbers, and was recalibrated before it could hold anything.

DATA Our own inbound records
ACCESS Internal
SCREEN None; a replay, not a screen

c

Brokers Alliance runs a scored pattern review of its own placed business to prioritize human review.

A business-quality pattern review looks at velocity, early lapse and surrender patterns, and carrier rotation across the business we place, and orders the queue for a person. A person judges every flag with the record in front of them, before any conversation with a producer. The score orders internal review; it does not by itself change a producer's status or terms. Results are private to sales leadership and never appear on a producer surface.

DATA Our own placed business
ACCESS Sales leadership only
SCREEN Internal, never a producer surface

d

Software routes and queues. A person changes, sends and signs.

The boundary in section four, restated as the commitment it is: a person makes every case change, sends every transaction, handles anything that touches a commission, and reads and signs every regulated page.

DATA Our own inbound and case records
ACCESS Internal
SCREEN Internal, described

WHY THE RULES STAY PRIVATE

Publishing the markers teaches gaming, so markers, thresholds and sweep dates stay inside. The daily review and the routing stay private for a plainer reason: a page about them would describe a desk, not prove it. What we publish is the shape: what is looked at, that a person decides, and that a flag by itself changes nothing for a producer.

IF YOU BELIEVE A REVIEW WAS WRONG

Not yet. The path a producer uses to raise a disputed review is being set with sales leadership and is not published. Until it is, this paper says less rather than more.

Kind of statement: operational commitment, in David Racich's name, dated. No markers, thresholds, names, sweep dates or counts appear here, by rule. **Proof:** his name and the date, stated as a commitment, not as a page to open.

THE CLOSE

What you can check, what you can test, and what to ask any distributor that says AI.

The seven questions an independent agent or a principal asks before anything else, each answered in a line or marked "not yet". Put them in writing to anyone, including us.

THE QUESTION	BROKERS ALLIANCE'S ANSWER TODAY
What can I use today, and what is invitation-only?	Today, with the contract: MyAdvisorCloud, MyAdvisorGrids, RetirementBrain, LifeBrain, automated contracting. By invitation: the MyAdvisorData connection, a pilot.
What does my contract entitle me to, and on what conditions?	The contract is the document. The technology is provided at no monthly charge with no fee to contract, as of the date on this paper; conditions such as appointments and activation are in the contract, not here.
How fresh is each status, and who resolves a discrepancy?	Some carriers feed status automatically; others are entered by our data team on a schedule. A timestamp means "retrieved then". The case manager named on the case resolves a discrepancy.
Which fields leave Brokers Alliance, to whom, kept how long?	For a connected principal: case status, open requirements and contracting progress, to the assistant the principal chose, never commission levels. We keep the request record, never the conversation. Not yet how long we keep that record is not published.
Does "downline off" limit who can log in, what they can see, or both?	Both, and the principal decides. The principal's downline agents have no login until the principal turns them on; the principal's own answers already cover the whole hierarchy.
What survives a revocation in the assistant's history?	Revocation ends future access on the next request. It cannot recall an answer already delivered. What remains in the assistant's history is governed by your terms with that vendor. The written terms a principal signs are set per hierarchy and are not published yet.
Can a business-quality score affect my relationship with Brokers Alliance, and how is an error corrected?	The score orders internal review; it does not by itself change a producer's status or terms. A flag puts a producer's business in front of a person, who reads the record before any conversation with that producer. Results are private to sales leadership. Not yet the correction path is not published.

THE CHECKLIST, IN PRODUCER LANGUAGE

- What do you actually run on automation, and who is accountable for it? You need a person, not a department.
- Who signs regulated content, and where is the name?
- What can I check myself, without asking you?
- What does the AI not do? A distributor that cannot state it has not drawn the line.
- Who owns the data and the hierarchy? Can it read, or can it write? Can I revoke it? Which assistant do I have to use?
- Is it live, and when can I have it? Running, being built, or imagined: a distributor should say which.

The full checklist, with our own answers including the ones we do not meet yet, is at brokersalliance.com/ai/what-an-ai-enabled-bga-is.

HOW TO JOIN

Contract as an independent agent. Carrier contracts, case design, in-house contracting and the technology behind them. No fee to contract, as of the date on this paper; the contract carries the conditions.

Affiliate a hierarchy or agency. Your hierarchy stays yours. Brokers Alliance works with you, not around you.

Ask about the pilot. If you run a hierarchy and want to be considered for the MyAdvisorData connection, say so on the invitation form.

All three start at brokersalliance.com/ai/join, or call (480) 210-7892 and ask for contracting.

Regulated content from Brokers Alliance is reviewed and signed by a named person before it is published, and the name is on the page. The signer of this paper is David Racich, President and CEO.



— FAMILY OWNED SINCE 1982

Run on data you can check.
Signed by a person you can name.

WHAT THE AI AT BROKERS ALLIANCE DOES NOT DO

- No suitability verdicts. Suitability is yours.
- No policy health scores.
- No product recommendations.
- No case changes.
- No transactions.
- No contact with a hierarchy's downline agents by Brokers Alliance.

Brokers Alliance, Inc. · Fountain Hills, Arizona · An independently owned distributor of life insurance and annuities

brokersalliance.com/ai · (480) 210-7892

Signer: David Racich, President and CEO. Brokers Alliance, Inc. is a separate and unrelated company from the FINRA-registered broker-dealer named Introducing Brokers Alliance, Inc.