



Allen Marketing & Associates, Inc.

Your Insurance & Financial Gatekeeper for the 21st Century



Patrick H. Allen, III.
Founder/President

*How would you like to have
my client database?
I use it for my personal
clients and now you can too!*

The way you track, manage and treat your clients is the difference between an insurance professional who is just making sales and one who is building their clientele and book of business.

We have spent tens of thousands of dollars over the years to put this system in place and want to make it available to all of our agents/producers!

Need a calendar to keep track of appointments? **Got It!**

Need quick access to client information? **Got It!**

Need to keep track of all client communication? **Got It!**

Need to keep track of all assets of your clients? **Got It!**

Need to track your clients medical conditions for life insurance? **Got It!**

Need to keep track of client referrals? **Got It!**

Need to generate birthday and anniversary lists to mail out cards? **Got It!**

Need to be reminded to call clients on specific days? **Got That Too!**

And so much more!

**This database can do anything to help prepare you for a complete
job of planning with your clients with little cost!
Call Ashleigh Fittro today for more information!**

800.877.6589