

# PC26

Trustmark  
Producer Conference  
Nashville • February 1-4, 2026

# AMPLIFY

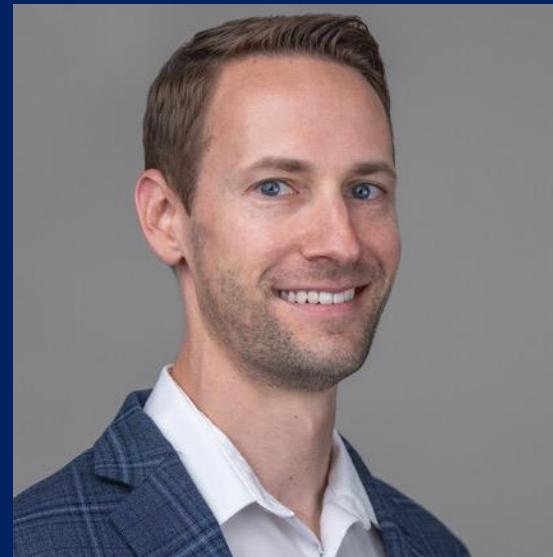
Trustmark 

# Playing the Hits: Discover Trustmark's Most Popular Marketing Tools



**Colin Coyne**

Regional Sales Director, Northeast  
Trustmark Voluntary Benefits



**Kevan Robbins**

Director, Broker Marketing  
Trustmark Voluntary Benefits

# How It Can Feel To Attend a Conference



## Who Attended a Session on Life and Long-term Care?

- The Sound of Security: Universal Life with Long-Term Care
- Trustmark Life + Care: A Market Staple
- The 5 Questions Your Clients Will Have About Life and Long-term Care



# This Session?



# Our Discussion

1. The Launchpad – Your Online Toolkit
2. Deep Dive on the Life and Long-Term Care Story
3. Other Popular Marketing Tools
4. How To Take Your Marketing to the Next Level



# A Little on The Trustmark Marketing Team

We are...

- Highly sales-focused
- Endlessly collaborative
- Always reinventing
- Half-artists, Half-scientists



# With That In Mind, We Built Launchpad

## What is The Launchpad?

- A centralized hub for internal and external partners to access collateral
- Maintained through regular updates
- Tracked for usage on our end
- Organized based loosely on the voluntary sales process
- A great way for you to reference information from this conference

### Access the Launchpad yourself!

- Use the cards provided at your seat
- [www.trustmarkins.com/launchpad](http://www.trustmarkins.com/launchpad)
- Password: TrustmarkVIP (Case sensitive)



# How Is The Launchpad Set Up?

## Marketing Team Structure = Launchpad Structure

### Pre-Sales Resources

Materials to help you educate and persuade employers on the need for voluntary benefits.

### Enrollment Resources

Materials to help you educate and engage employees related to voluntary benefits enrollments.

# What Will We Look At?

## Choosing Today's Pieces

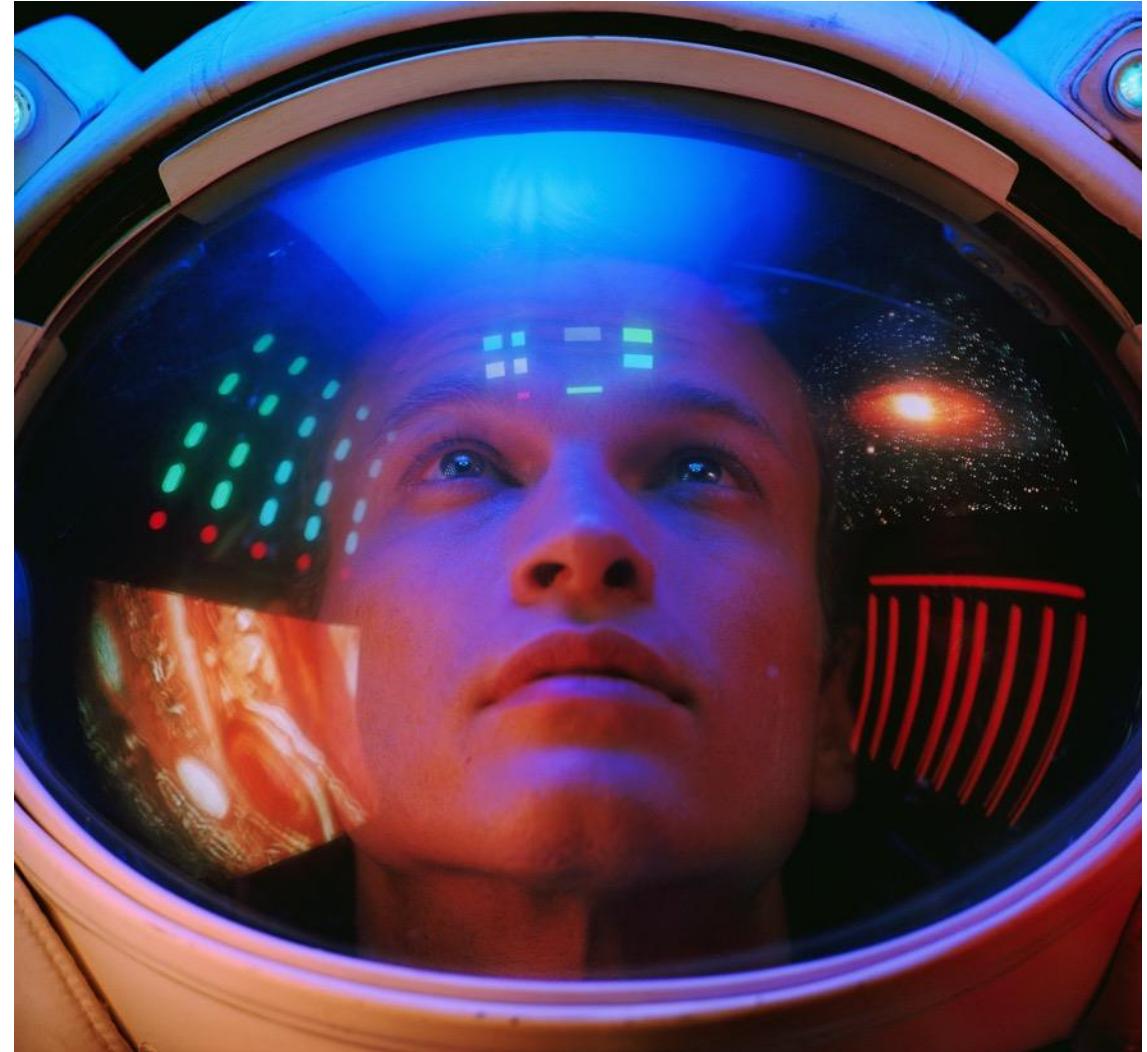
- We've compiled some trending and popular pieces based on:
  - Data collected through the Launchpad
  - Feedback from our sales team and brokers
  - Popular sessions at this conference and previous conferences
- You can follow along – access the Launchpad with your card and check it out!



# Lost In Space?

## The Launchpad is Vast

- There is a lot of content on the Launchpad
- We'll highlight some particularly good pieces and show how to find them
- It's arranged intuitively, you can and should explore on your own
- If you get stuck, your sales rep is well-versed and may have access to additional materials



# The Launchpad In Action

Deep Dive on the Life and Long-Term Care Story



# Let's Consider a Sales Situation

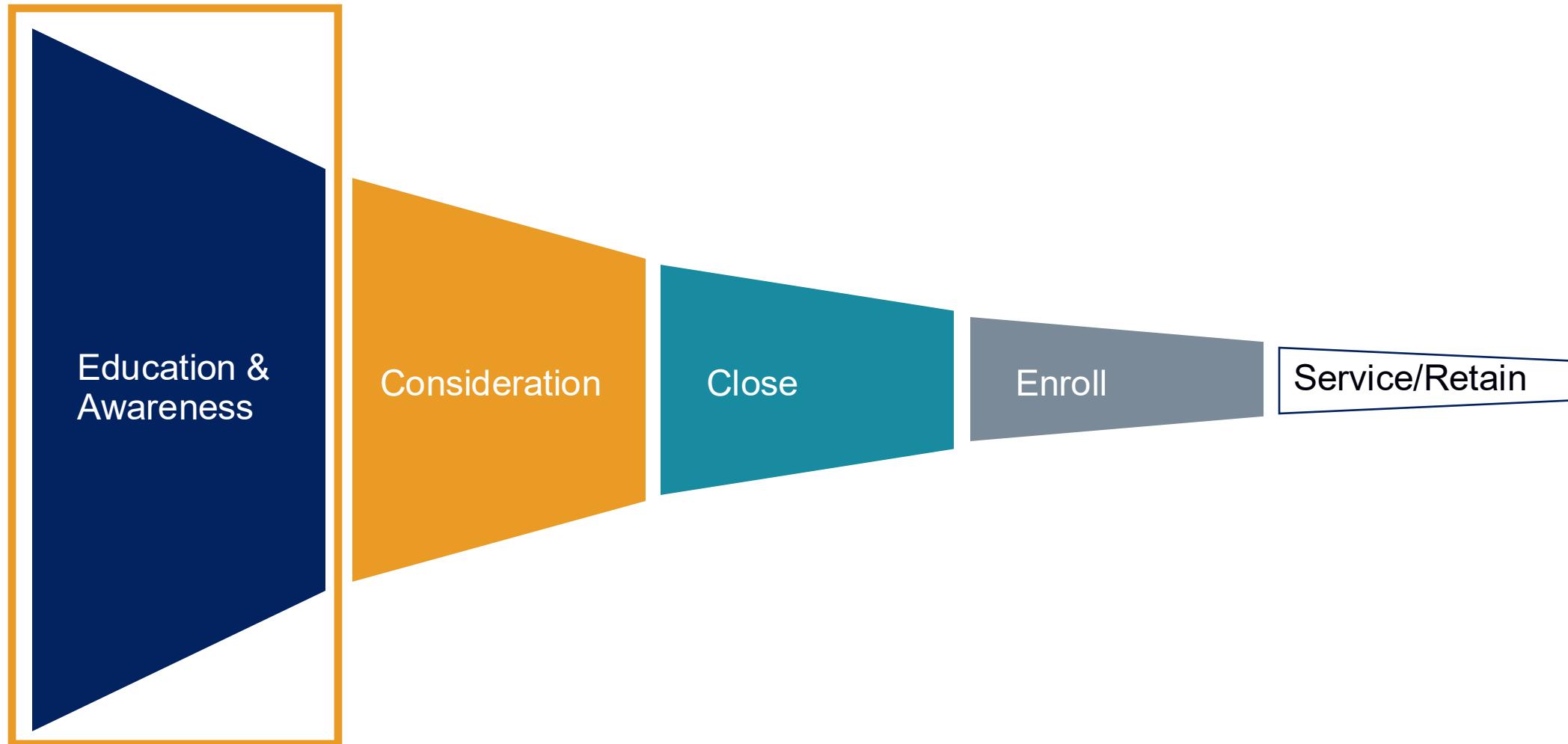
## Introducing Trustmark Life + Care®

- You have a hospital client who you know is a good fit for a life and long-term care product
- They've never looked at a hybrid solution and tend to be conservative when introducing new products
- How can the Launchpad make this easy for you? With tools at every step of the process.



# How Do We Think About Marketing?

Not Unlike a Sales Funnel



# Educating Employers on Life and Long-term care

## Establishing the Need

- Employers are often aware, but need the challenge of care explained in more detail
- Many pieces on the Launchpad lead with education, rather than a product push
  - Discuss the number of people who need care
  - Costs of care
  - Relevance across generations
- Use these for thought leadership, opening doors

## The Need for LTC Flyer



**Changing long-term care needs**

A swirl of demographic, legislative and economic factors have put the topic of care in the spotlight. To help employees prepare, it's important to understand what's driving this growing challenge.

**Adding up the numbers**

**The growing need for care**

By 2030, for the first time in U.S. history, those above the age of 65 will outnumber those below the age of 18.<sup>1</sup>

70% of people over age 65 will need long-term care at some point in their life.<sup>2</sup>

A growing elderly population that is likely to need care means an increased demand for care.

**The difficulty of accessing care**

72% of nursing homes say their current workforce levels are lower than pre-pandemic staffing levels.<sup>3</sup>

The median monthly cost for independent living facilities in the United States is \$3,665. By 2040, this could rise to over \$4,100 a month.<sup>4</sup>

Shrinking care resources and increased costs mean that access to care is more difficult for employees.

**Care is also a challenge for younger people**

60% of Trustmark long-term care claimants are under age 65.<sup>5</sup>

30% of Trustmark claims for long-term care are for conditions that are non-permanent.<sup>6</sup>

More people under age 65 require care, which adds to the demand for care and caregivers.

**Younger people are part of the care conversation**

29% of Gen Z and 31% of Millennials say that they are extremely likely to consider a life care combination product.<sup>7</sup>

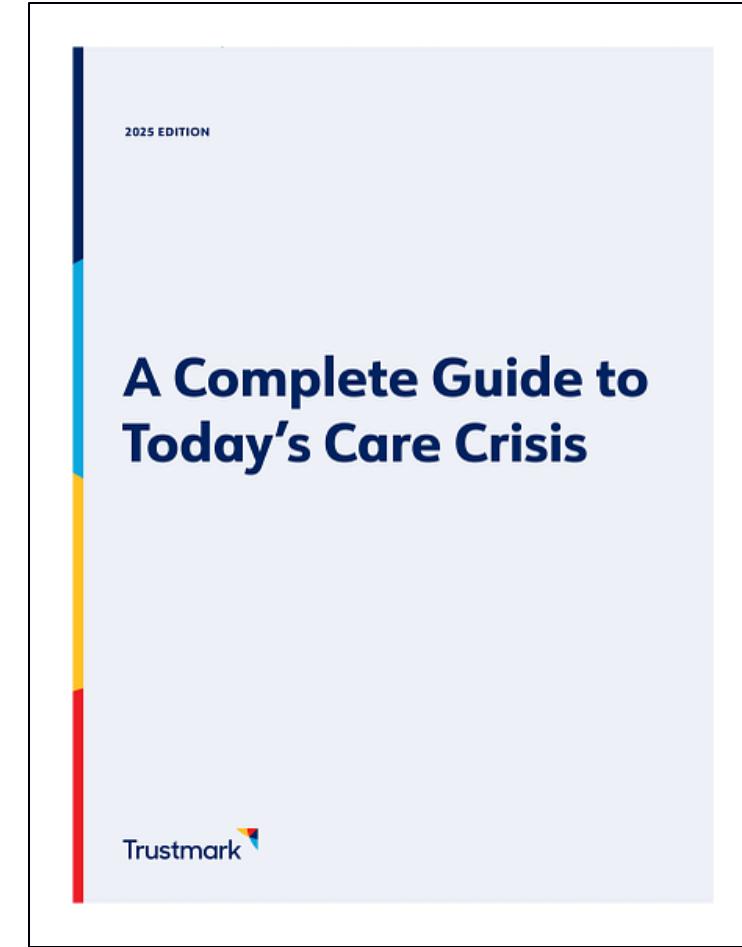
Millennials are the generation with the highest level of concern about long term care, and are most likely to be 'sandwiched' between caring for children and older adults.<sup>8</sup>

Concerns about care are pervasive - conversations about care may be relevant for a wide range of employees.

**Trustmark**

Find it on Launchpad: Pre-Sales Resources > Group Products > Trustmark Life + Care

# Special Access: Care Crisis White Paper



# Let's Find This One Together!



Find it on Launchpad: Pre-Sales Resources > Group Products > Trustmark Life + Care

# Meeting with Robbins, Kevan

2026-01-15 14:45 UTC

Recorded by

Robbins, Kevan

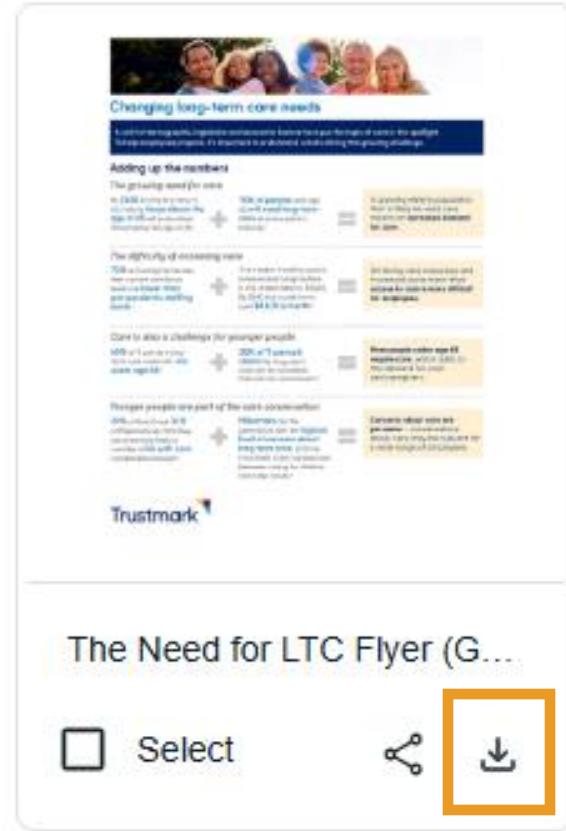
Organized by

Robbins, Kevan

Find it on Launchpad: Pre-Sales Resources > Group Products > Trustmark Life + Care

# Sharing From The Launchpad

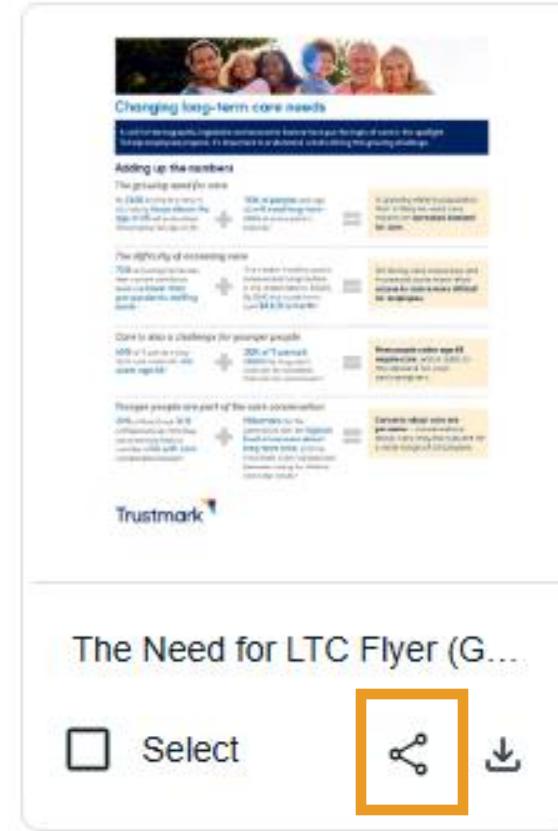
## Download and share as an attachment



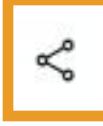
The Need for LTC Flyer (G...)

Select  

## Share a link straight to the file



The Need for LTC Flyer (G...)

Select  

# Sharing From The Launchpad

## Download multiple files

2 selected [Download selection](#) [Download all](#)

**Why act now on life insurance?**

Universal life insurance can be a great way to protect your loved ones. It's a way to ensure that your family is taken care of in the event of your death. It's also a way to provide for your loved ones in the event of your death.

**Universal life insurance can be a great way to protect your loved ones. It's a way to ensure that your family is taken care of in the event of your death. It's also a way to provide for your loved ones in the event of your death.**

**Unlocking the potential of life insurance and long-term care enrollment**

Universal life insurance can be a great way to protect your loved ones. It's a way to ensure that your family is taken care of in the event of your death. It's also a way to provide for your loved ones in the event of your death.

**Solving for life insurance and long-term care needs through Trustmark's Universal Life Insurance**

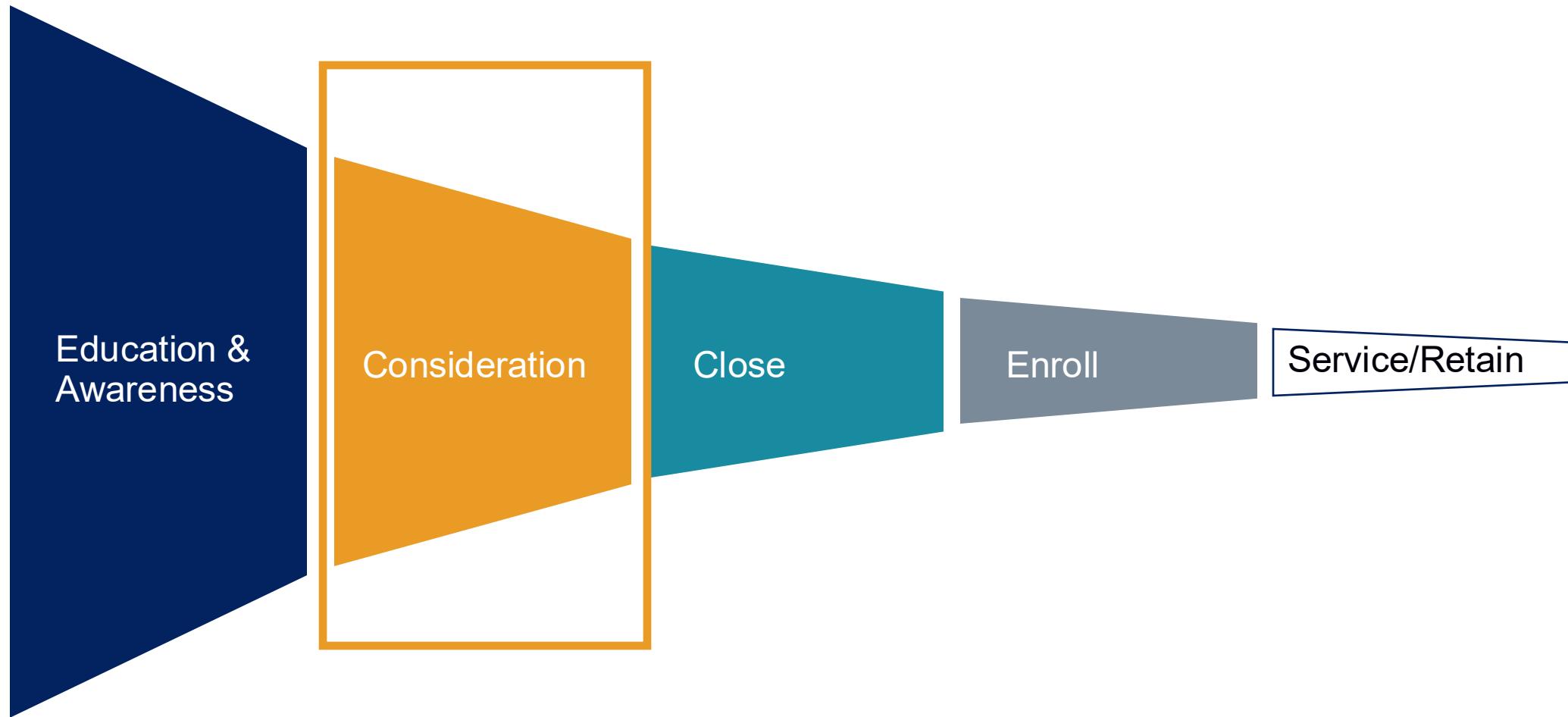
Universal life insurance can be a great way to protect your loved ones. It's a way to ensure that your family is taken care of in the event of your death. It's also a way to provide for your loved ones in the event of your death.

**Choosing the right life insurance**

Universal life insurance can be a great way to protect your loved ones. It's a way to ensure that your family is taken care of in the event of your death. It's also a way to provide for your loved ones in the event of your death.

# How Do We Think About Marketing?

Not Unlike a Sales Funnel



# Introducing Trustmark Products

## They Understand the Need, Now Show the Product

- Materials with varying level of detail for different audiences
- Used by producers to support conversation around the product, rather than just the need
- For those wanting a deep dive, our product catalog goes in depth
- We split out these pages to be shared one product at a time
- Tells the product “story” as well as the features

## TLC Product Catalog

### Trustmark Life + Care® insurance

#### Take charge of tomorrow

Trustmark's newest hybrid life insurance product is uniquely designed to help employees finance their care needs. Combining permanent life insurance with either a 7702B qualified Long-Term Care<sup>®</sup> or Chronic Care benefit for caregiving services, and featuring guaranteed premiums and ultra-simple administration, Trustmark Life + Care is here to address the market's ever-growing need for affordable care solutions.

#### It's Trustmark Life...

##### + Choice

Empower consumers to receive care on their terms. Provide an option to collect benefits for family caregiving as well as professional caregiving – a Trustmark first!

##### + Compatibility

Permanent term life insurance design makes Trustmark Life + Care easy to administer on the benefit platforms of your choice and simple for employees to understand and utilize.

##### + Certainty

Guaranteed rates, guaranteed benefits<sup>®</sup> and guaranteed issue! Consumer premiums are fixed at issue age and set to last a lifetime without increasing. Death benefits are assured even if care benefits are never collected.

#### It's Trustmark Life + Care - now available to quote and sell

#### Benefits for caregiving services

Trustmark Life + Care includes either a Long Term Care or Chronic Care benefit that advances up to 100 percent of the death benefit to help pay for qualifying caregiving services. Both the Long Term Care and Chronic Care benefits operate in largely the same fashion: we cover both professional and family care and can pay certificate holders as they move between the two. And, if you choose our Chronic Care benefit there is no premiumary requirement, unlike some other products in the market.

##### Professional Caregiving benefit

- Provides 4 or 65%\* of the benefit amount per month to help pay for professional caregiving services – such as home health care, adult day care or assisted living – up to a maximum of the face amount.



Example for a \$100,000 policy: 4% benefit: \$4,000 per month, up to \$100,000 maximum. Alternatively, policyholders can receive a one-time lump sum payment of 20% of the face amount. Lump sum payment option available with Chronic Care benefit only.

##### Family Caregiving benefit

- Provides 2% of the benefit amount per month – up to a maximum of the face amount when caregiving services are provided by a family member or friend.

Example for a \$100,000 policy: \$2,000 per month, up to \$100,000 maximum.

Alternatively, policyholders can receive a one-time lump sum payment of 10% of the face amount. Lump sum payment option available with Chronic Care benefit only.

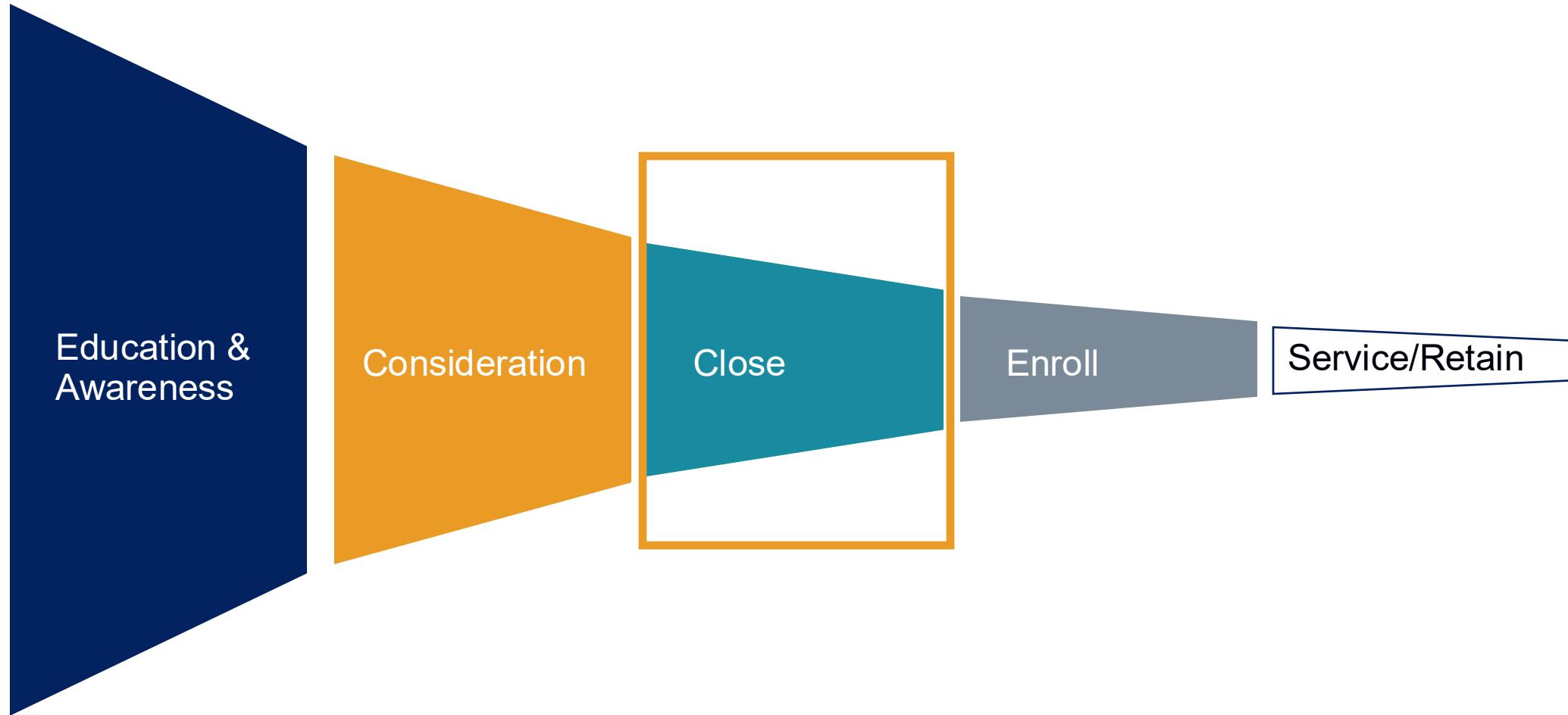
Note: You can switch between receiving family caregiving and professional caregiving when both benefits are included. Both Professional and family caregiving benefits are payable after 90 days of qualifying care has been received.

\*Benefits are payable after 90 days of qualifying care for home care and the available for payment face amount and available max only after you become a risk preferred by death.

Find it on Launchpad: Pre-Sales Resources > Group Products > Trustmark Life + Care

# How Do We Think About Marketing?

Not Unlike a Sales Funnel



# Closing the Deal

## Ultimately Your Sales Rep Is Your Best Source

- Rely on your salesperson for a quote
- They can work on collaborating with you to create finalist presentations
- One of our most common requests at this point is a case study, they want us to "prove it"
- Case studies take a simple 3-part format
  - Problem
  - Solution
  - Results

CASE STUDY | CALIFORNIA BASED LAW FIRMS

### Strategic Benefits Communication To Educate Employees on Long-Term Care

Five unique California-based law firms each utilized Trustmark's enrollment communication capabilities to drive enrollment.



**Client Overview:**

- Five Law Firms
- Based in Southern California
- Limited HR Resources for Benefits Education

**Objective**  
To empower five California law firms with meaningful life with long-term care (LTC) benefits that not only support employee well-being but also differentiate the firm in a competitive talent market. By integrating LTC into their total rewards strategy, firms can demonstrate long-term investment in their people, attract and retain top legal talent, and address a growing financial and emotional need faced by attorneys and staff alike.

**Challenges**

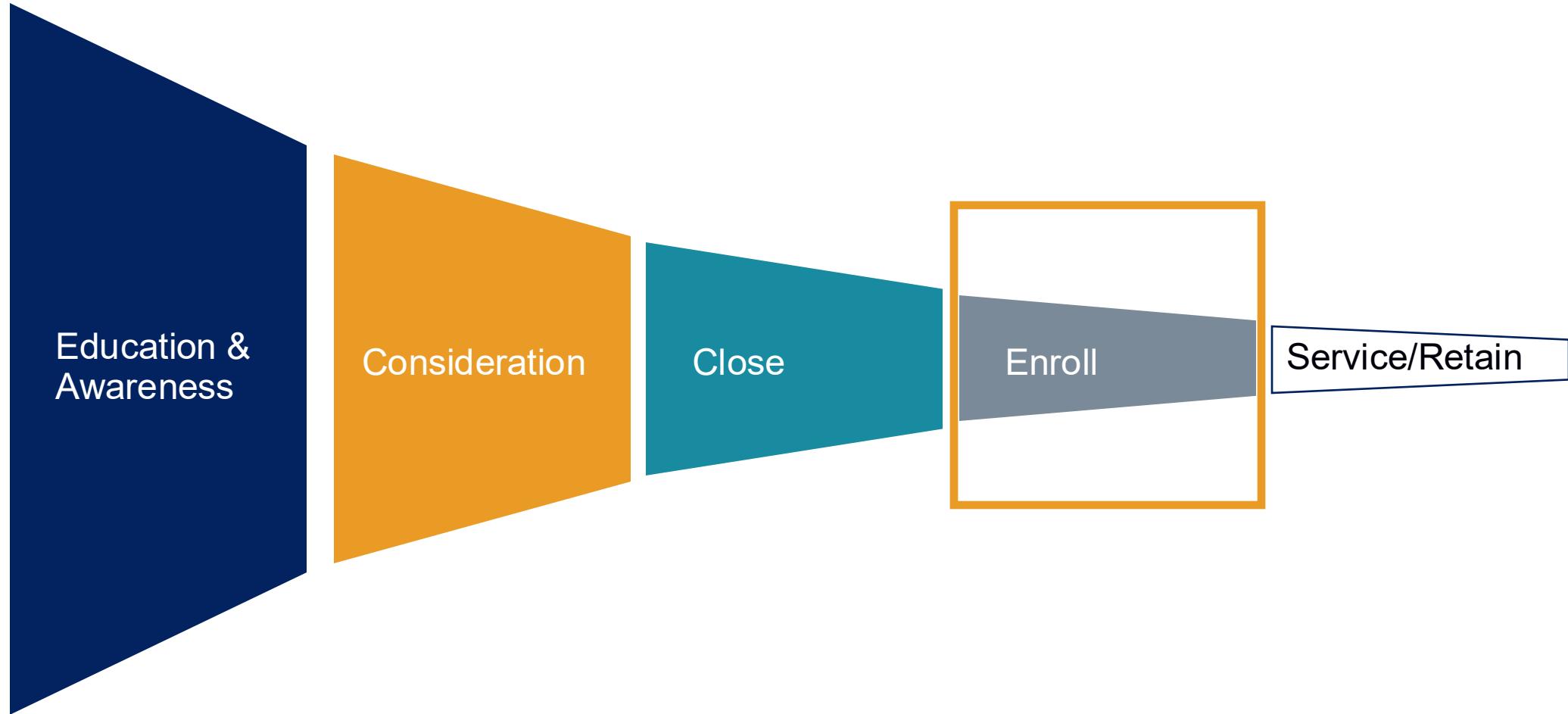
- Communication Barriers:**  
Law firms' hierarchical communication structure makes it difficult to engage employees with broad communications
- Time-restricted:**  
Employees are often busy with client work, making it difficult to get their attention for non-tasked related work items
- Privacy Concerns:**  
Employees tend to be skeptical of giving out personal information, making it difficult to get them on board during enrollment

Trustmark

Find it on Launchpad: Pre-Sales Resources > Introducing Trustmark > Case Studies

# How Do We Think About Marketing?

Not Unlike a Sales Funnel



# Enrollment Solutions at Your Fingertips

## Enrollment Requires Education

- We have a turnkey process for building communication plans – “The Lookbook”
- Supported by key materials/samples housed on the Launchpad
- Runs the gamut of formats:
  - Emails
  - Texts
  - Postcards (Highlighted)
  - Videos
  - Benefit summaries
  - Presentations

**Postcard Sample:**

You Deserve the Best Care Benefit Possible. Enroll Now!

[Client Name] employees are eligible to enroll [Enrollment Dates] for Trustmark Life + Care® insurance.

Trustmark Life + Care® insurance is permanent life insurance that includes care benefits. It offers cash payments directly to you when you receive qualifying caregiving services. It also provides a death benefit to your beneficiaries that can help protect those who depend on you.

**Brochure Sample:**

**What would happen if you couldn't take care of yourself anymore?** If you needed help just to feed or dress yourself, to move around or use the bathroom? Many Americans know that it's important to be a caregiver for a loved one or a friend. Now imagine how that would affect your family, your health, and your financial well-being.

**Trustmark Life + Care® insurance can help.** It provides care benefits funded by permanent life insurance. It can mean knowing that when the time comes, you'll be able to receive care on your terms with more comfort and quality of life for you, and less worry or hardship for your family.

**How are care benefits?**  
Care payments are sent directly to you when you receive qualifying caregiving services.

**How much do caregiving services cost?**  
Caregiving can be hard on family and friends, and professional help may be pricey.

**Do People Under the Age of 65 Need Care?**  
It is reasonable to expect that as you age, you may need care benefits. What is surprising is the significant number of people younger than age 65 who actually need care as well. Statistics show why it is important to have a plan for care benefits at any age.

**Will I ever use this insurance?**  
Someone turning 65 today has a nearly 70% chance of needing some type of care services in their lifetime.<sup>3</sup>

Warning: "Older New Statistics About Long-Term Care Pandemic Edition," 2020. Trustmark, "Cost of Care Survey," 2020. Long-Term Care and Support, "AMPLIFY," 2019. LongTermCare.gov, "How Much Care Will You Need?" midFeb 2020. "AMPLIFY National Alliance for Caregiving," LongTermCare.org, 2019.

**Landing Page Sample:**

**Life + Care**  
**New Long-term Care Benefit for [Case Name] employees**

**Two-in-one protection: a long-term care solution included with permanent life insurance.**

**ENROLL** [X/XX - X/XX]

[LOGO HERE]

Find it on Launchpad: Enrollment Resources > Life + Care

# A Comprehensive Video Library

- A range of employee-facing videos:
  - Introducing Trustmark
  - Establishing product need
  - Educating on how the products work
  - Telling relatable stories for employees



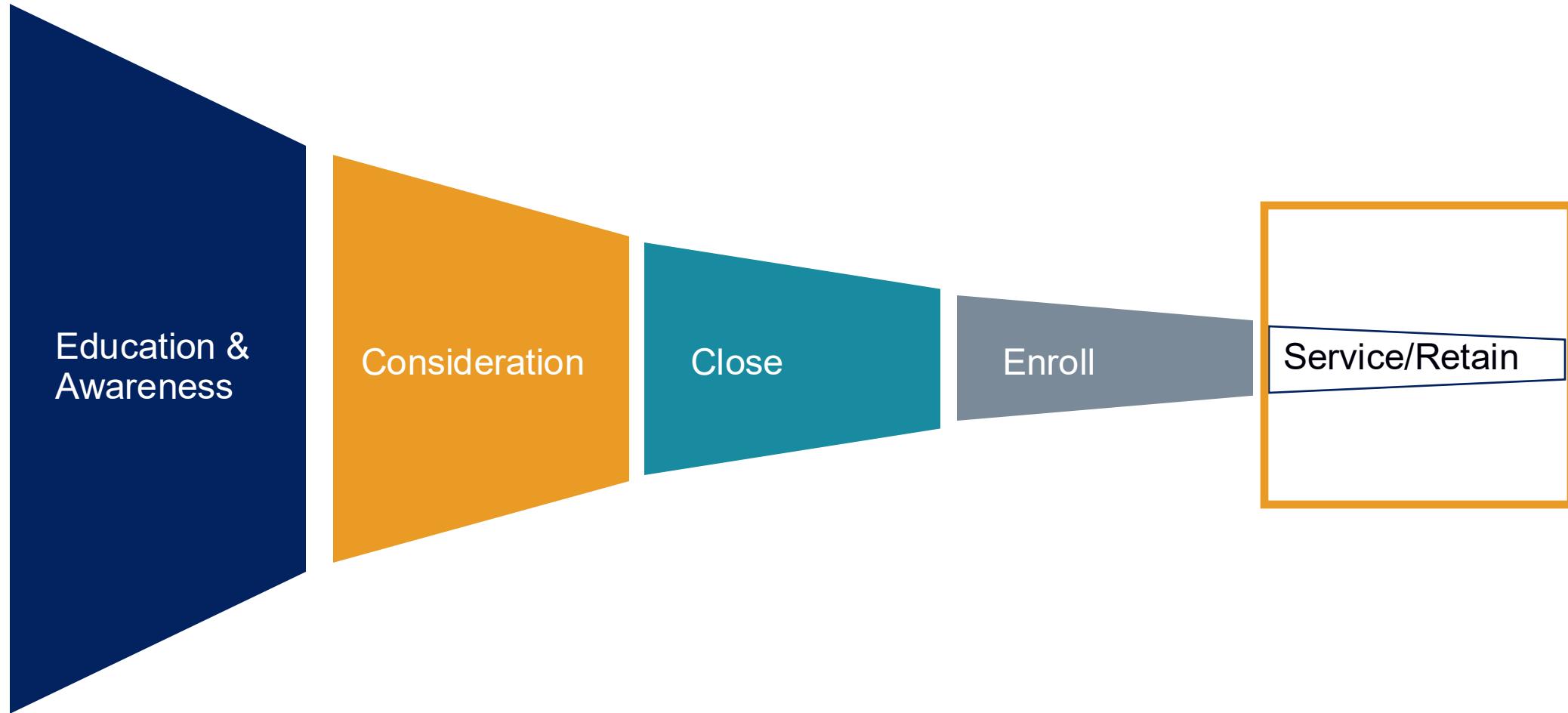
**Pre-Sales Resources**

**Enrollment Resources**

**Video Resources**

# How Do We Think About Marketing?

Not Unlike a Sales Funnel



# Make Your Relationships “Sticky”

## No One Likes Losing Cases

- Resources you need to make servicing the case easy
- Guidance on filing claims, billing, customer support and more
- Easy to access, easy to share, easy to use

## Claims Portal One-Pager

**Trustmark Voluntary Benefits' portals for policy owners**

We meet customers where they are 24/7, making interacting with us online at TrustmarkVB.com or by phone easy.

**Connect on any device**

Policy owners can log in on laptops, mobile devices or tablets to view their personal policies and benefit details, as well as:

- Update personal and contact information
- Quickly file claims
- Enable text updates on claims status switch to direct bills
- Make payments

Whether it's a life and long term care, accident, disability, or other voluntary benefits claim, filing a claim has never been easier. Visit [www.trustmarkbenefits.com/claims](http://www.trustmarkbenefits.com/claims) to learn more.

Trustmark is a registered trademark of Trustmark Insurance Company. Underwritten by Trustmark Insurance Company and Trustmark Life Insurance Company of New York. Rated A (EXCELLENT) AM Best.

A102-270-Portal (06/24)

Find it on Launchpad: Enrollment Resources > Trustmark Features

# Other Popular Marketing Tools



# Did Anyone Attend?

**Trustmark ACH: How to Stick the Landing on Billing**

Monday - 2:40 PM

**Enroll For Life: Setting the Stage for Smarter Enrollments**

Tuesday - 10:00 AM

**Employer-paid Benefits: What's next for Trustmark?**

Monday - 1:50 PM

# We've Got Those Conversations Covered Too

## ACH Overview

**VOLUNTARY BENEFITS | ACH DEDUCTIONS**

### Solve Your Billing Challenges with Trustmark

ACH deductions make billing simple

**Billing Made Easy With ACH Deductions**  
Billing headaches can be a thing of the past for employers with Trustmark's simple billing solution - ACH deduction. We can automatically draft funds straight from the policyholders' checking or savings account - no payroll deduction.

**ACH Offers Advantages for Both:**

Employers	Employees
<ul style="list-style-type: none"><li>No management of paycheck deductions</li><li>Opportunity to save on third-party billing services or administrative charges</li><li>No responsibility for premium payment process</li><li>No need to dedicate a payroll slot Trustmark benefits</li><li>Streamlines benefits and billing process</li></ul>	<ul style="list-style-type: none"><li>A more permanent insurance payment solution</li><li>ACH payments continue regardless of job changes or retirement</li><li>Set it and forget it - employees receive notifications when their account is automatically withdrawn from their account</li><li>A simple, straightforward payment method that employees likely use for other regular payments, such as loans</li></ul>

**ACH Reduction Requirements:**

- Must be a new Trustmark Client
- Minimum 100 eligible employees
- Available for all worksite and group products
- Enroll with Trustmark integrated systems\*
- Salary reduction determined to cover-by-case basis

\*Contact your Trustmark sales professional for a list of details

Start offering ACH deduction to employees today. Contact your local sales representative at [trustmarkbenefits.com](http://trustmarkbenefits.com)

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4012-095 (07-18)

## Enroll For Life Overview

**Trustmark Enroll For Life - Simplifying enrollment by empowering employees**

Offering best-in-class benefits protection doesn't have to be hard. For employers looking to simplify enrollment without sacrificing benefits education, Trustmark Voluntary Benefits' Enroll For Life platform is the key to offering industry-leading voluntary protection.

**Enroll For Life: Designed to support your workforce**  
Enroll For Life is a self-service benefits enrollment platform that excels at delivering Trustmark's permanent life with long term solutions. It's designed to help employers boost benefits education, streamline administrative duties, and drive employee engagement.

Key features	Key results
Built-in platform for email, text, and voice messaging	Easily educate employees on their benefits to drive engagement
Mobile-friendly design	Enroll anytime, anywhere from a laptop, tablet, or mobile device
Live chat and call center support	Give employees the guidance they need without burdening HR resources
Built-in reporting and dashboards	Get easy insights into your enrollment's performance
Encrypted platform with two-step verification	Secure employee and employer data through a system you can trust

**Enrollment made simple**  
Enroll For Life is built to maximize employee engagement by making enrollment simple. It leverages a proven enrollment methodology requiring each employee to make one of three simple choices in the system:

**Opt in** to select the minimum coverage amount  
**Opt up** to select a higher level of coverage  
**Opt out** to decline coverage

Enrolling industry-leading voluntary protection just got easier. Our team can show you how, with Enroll For Life.

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©2018 Trustmark Insurance Company. Trustmark Enroll For Life is a trademark of Trustmark Insurance Company.  
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4012-095 (07-18)

## Pre-Sales Resources Billing & BenAdmin ACH

## Employer-Paid TLC

**VOLUNTARY BENEFITS | TRUSTMARK LIFE + CARE\***

### New Ways to Deliver Long-Term Care Protection

Trustmark Life + Care\* is available to enroll as an employer-paid benefit, providing more flexibility for employers to deliver the benefits today's employees need. Now there are more ways than ever to help employees take charge of tomorrow.

Trustmark Life + Care\* is a permanent term life insurance product that addresses modern care needs by providing caregiving benefits for both professional and family care. Offering this protection on an employer-paid basis:

- Supports recruitment and retention of employees
- Ensures employees have added protection against the growing costs of long-term care
- Supplements existing life insurance coverage
- Gives automatic access to CareLoop® care management services

**3 Ways to Offer Employer-Paid Trustmark Life + Care\***

Case Size	100+ Employees	25-99 Employees	
Minimum Number of Employees on Employer-Paid Plan	Option 1 15	Option 2 10	All employees
Voluntary Plan Offered to All Employees	No	Yes	N/A
Buy Up Options	Yes	Yes	Yes
Policy Portability	Yes	Yes	Yes
Minimum Employer-Paid Benefit	\$10,000 - \$50,000	\$10,000 - \$25,000	\$20,000 - \$30,000
Employer-Paid Guaranteed Issue (GI) Limit	Up to total GI limit	Up to total GI limit	\$100,000

Note: Available on new business only. Contact your Trustmark representative for full details.

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©2018 Trustmark Insurance Company. Trustmark Enroll For Life is a trademark of Trustmark Insurance Company.  
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4012-095 (07-18)

## Pre-Sales Resources Billing & BenAdmin Trustmark Enroll For Life

## Coming soon! Trustmark only access currently



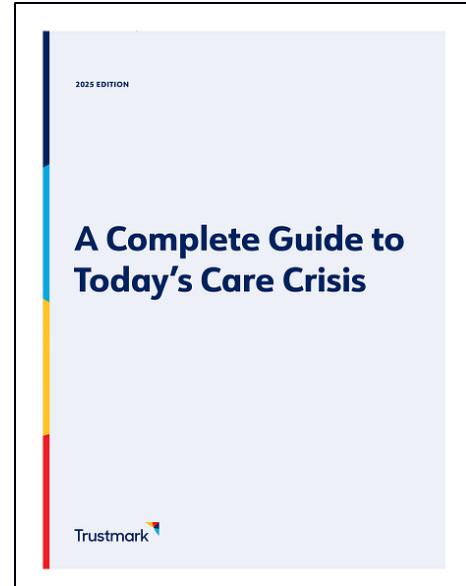
# Your Top 4!

## The Need for LTC Flyer



- Pre-Sales Resources
- Individual Products
- Universal Life

## Care Crisis White Paper



**Special Access, use the link above!**

## Enroll For Life Overview



- Pre-Sales Resources
- Billing & BenAdmin
- Trustmark Enroll For Life

## Communication Matters



- Pre-Sales Resources
- Communication & Enrollment Services



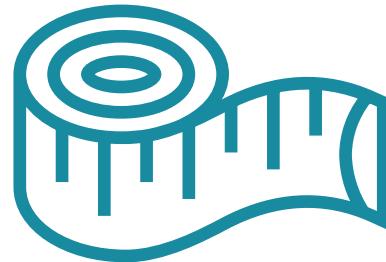
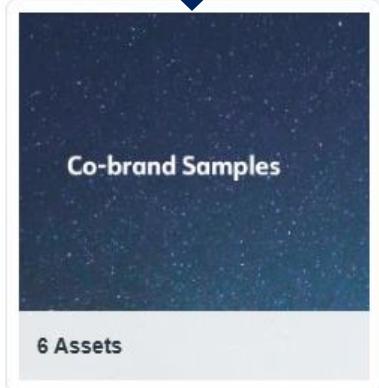
# Take Your Marketing to The Next Level

# The Launchpad Is Just the Start

## How to AMPLIFY



Co-brand



Customize



Build your own library

# Key Takeaways

- Wherever you are in the sales process, you're not alone
- Overloaded with information? Launchpad makes it easy to share that information
- Consider these popular materials, but there are lots of other great resources for you out on the Launchpad
- Getting familiar with the Launchpad is just the start



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# Thank you!

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