

# Senior Market Sales, Inc. Annuity Marketers

**Annuity Department: 1-877-645-4939**

*(Last four digits of direct line = extension number)*



**Bill Kauffman**  
V.P., Financial Products

Bill Kauffman CLU, ChFC, LUTCF, LLIF, started in the insurance industry as an agent for Mutual of Omaha more than 28 years ago. He still relies on that field experience today in his current role leading the life and annuity marketing efforts for Senior Market Sales. Prior to joining SMS in 2008, Bill was vice president for a large life carrier. He relishes the opportunity to help SMS agents grow their life and annuity business and meet their client's needs.

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**Bruce Zimmerman**  
Annuity Case Manager

Bruce Zimmerman brings an eye for detail and a passion for problem solving to his role as Annuity Case Manager for Senior Market Sales. Prior to joining SMS in 2008, Bruce spent four years working in new business with Pacific Life and another six years at Mutual of Omaha supporting their new business, licensing and commission units. He started his insurance career as an agent for Farmers Insurance where he sold property and casualty and life and health insurance, including annuities, and was a recipient of the Blue Vase award.

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**Candice Revas**  
New Business Associate, Annuities

Candice came to SMS in February 2009 and has since worked with many of the different departments. She currently works in the New Business department and is responsible for processing new annuity applications received in house, checking to make sure they are accurate and sent to the carrier in good order. Candice says, "The most rewarding part of helping agents is letting them know that they always have someone to turn to. The level of service and support SMS offers is rare in any industry and it is always rewarding when an agent lets you know that they appreciate you and what you have done for them. It makes me willing to go that much more above and beyond on that next issue with the next agent."

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**Chris McDonald**  
Marketing Coordinator

Chris became interested in insurance marketing while selling travel insurance and working toward his Bachelor's degree in business management from the University of Nebraska-Lincoln. He joined SMS and quickly moved up the ranks to provide expert annuity marketing advice to agents. Chris values his business relationships and looks forward to helping agents develop and grow their businesses.

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**Cory Adamson**  
Marketing Coordinator

As an annuity and life Marketing Coordinator, Cory Adamson enjoys helping agents save time and grow their income by introducing them to new marketing techniques, assisting them with case design and offering quality sales and marketing tools. Prior to joining Senior Market Sales, Cory owned a successful financial advising practice for 12 years, where he was an 11-time Million Dollar Round Table producer with two Court of the Table qualifications. Cory put his expertise on display and marketed his practice with more than 15 published articles and numerous print, radio and television interviews on the subject of financial planning. In addition to being a licensed life and health agent, Cory also has his Series 7, 63, 65 licenses and an LUTCF designation. Cory holds a bachelor's degree in political science and economics from the University of Nebraska.

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**John Shields**  
**Marketing Coordinator**

John Shields loves to witness the life and annuity agents he works with growing and succeeding as they implement the tips and information he learned during his years as a successful agent. John spent five years in the field, focused on selling Medicare Supplements and life insurance. He received numerous awards for exceeding production goals—twice earning Top 40 Agent honors for a major carrier. John has his life and health licenses in both Nebraska and Iowa.

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**Jon Summers**  
**Marketing Coordinator**

As an annuity marketing coordinator, Jon Summers works with agents and advisors to help them choose the right annuity products and uncover opportunities to better serve their clients. Jon enjoys asking agents and advisors the tough questions that get them to see the challenges and opportunities facing their business in a new light. Agents appreciate Jon's commitment to service, which he displayed in his previous role at SMS as a new business associate. Jon holds a Bachelor of Science degree in Marketing and Management from Northwest Missouri State.

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**Keith Krumrey**  
**Marketing Coordinator**

Keith brings years of relationship building skills to Senior Market Sales. His high energy and an attitude of “the customer is king” are in keeping with the customer service philosophy at SMS. With a background in wholesale operations as well as the home office environment, Keith will help you save time and money with great marketing support in all product offerings at SMS.

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**Ken Colvard**  
**Marketing Coordinator**

Ken Colvard came to SMS with experience managing a call center as a licensed insurance agent with a major Midwest carrier, and as an annuity sales manager for a brokerage firm. He has worked in the mortgage industry as well as banking and finance and currently has series 6, 63 and 65 Investment Registrations. This experience makes him an excellent addition to the SMS marketing staff.

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**Todd Davis**  
**Marketing Coordinator**

Todd came to SMS with 13 years of selling experience. He truly enjoys helping producers sell more annuities by offering sales and marketing ideas to grow their business. He believes once they learn a new sales idea it's like the analogy of teaching a man to fish vs. giving him a fish to eat. Todd was previously at Mutual of Omaha where he was the Marketing Manager for their Life Insurance. Todd received his Bachelors in Business Administration from Bellevue College.

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**Wendy Swanson**  
**Marketing Coordinator**

Wendy has been in sales and marketing since 1991. In 1996, she began marketing life insurance and eventually moved into other areas of insurance including health and annuities. With a Bachelor's degree in marketing management and training in the area of psychiatry, she has developed strong philosophies as a marketer. With a focus on annuities, Wendy will work with you to find the right solution for each situation.

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