

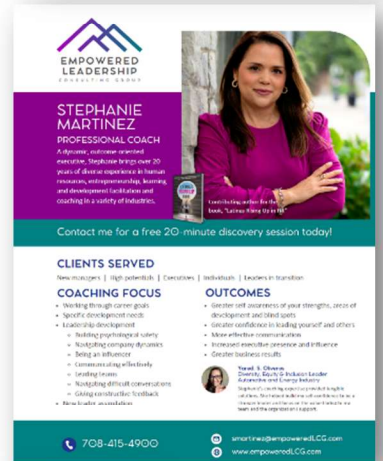
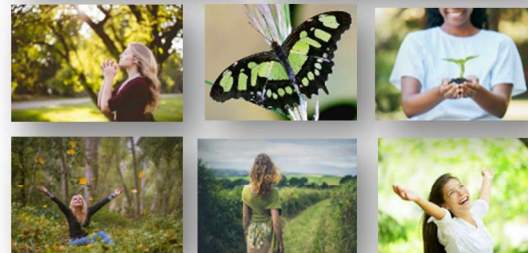
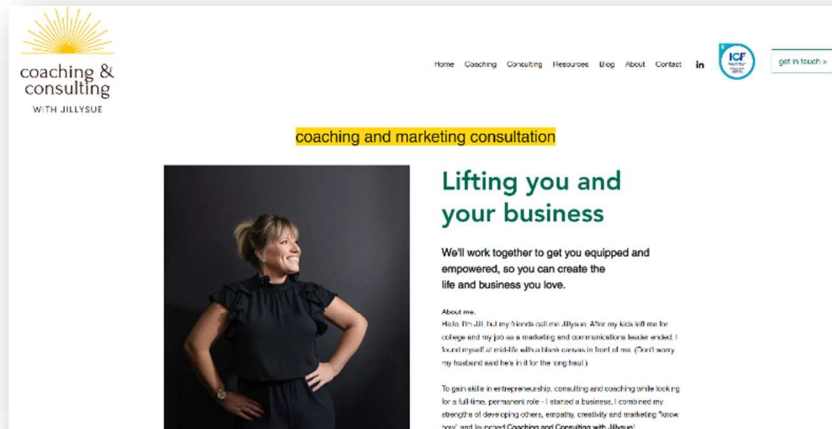
# Jill Hartmann

Marketing and Communications Portfolio

# Marketing Consultation (July 2023 – present)

## BRANDING, LOGOS, FLIERS, SOCIAL MEDIA GRAPHICS

- Used Canva and Wix to create my logo and website at <https://www.jillysue.com> (below) for coaching and marketing consultation
- Developed brand questionnaire to gather info on strategy, audience, value proposition, voice, colors and images. Then, used Canva to create logos, fliers, social media graphics, business cards, etc. (right)
- I also provided website consultation and social media plans for business development for several clients




# Marketing at Ohio National (15+ years of experience, through 2022)

## INDUSTRY ADVERTISING CAMPAIGN


- Purpose of campaign was to attract financials professionals and provide leads to recruiters; this multi-channel campaign led to 120% increase in leads
- Worked with distribution leadership to develop value proposition and tagline: **Your business. Your vision. We'll help.**<sup>®</sup>
- Used print and digital industry ads, thought leadership articles, event attendance (MDRT, NAIFA, WIFS, etc.), emails, social media, videos and more to direct prospects to <https://www.joinohionational.com>
- Leads were nurtured via email journeys. Once leads were "warm," they were passed to a recruiter

Please note: Since Ohio National was acquired by AuguStar, some website content may no longer be accessible or may have changed




**You. Us. It just makes sense.**  
It's your business and it reflects your passion and unique vision. You own it, you shape it. We'll help you build it your way with:

- Flexible contract options and liberal vesting built on a foundation of independence
- Expertly designed products that deliver value in a wide range of economic conditions
- Completely independent broker/dealer
- Personal support, including local representation and teams across the company who are just a call away
- Financial strength and long-term focus guided by policyholder interest



**Your business. Your vision. We'll help.**  
IWL | WHOLE LIFE | IUL | UL | TERM | ANNUITIES | DI



**Learn the diversity retirement plans with the resources at [joinohionational.com](https://www.joinohionational.com)**

**Plant the seeds of tax diversification**

Use planning for the future to reduce the tax burden on your retirement income. There are many ways to do this, and we can help you choose the right one for your situation. Our experts will help you understand the different options and how they can help you reach your goals.

**Keep the rewards in retirement.**

**Your business. Your vision. We'll help.**  
TERM | WHOLE LIFE | IUL | UL | ANNUITIES



**Learn more! [Learn about our IUL, UL, & DI account at \[www.joinohionational.com\]\(https://www.joinohionational.com\)](https://www.joinohionational.com)**

**Full spectrum protection**

The best financial plan doesn't just offer life insurance to protect your family. It also offers the flexibility to help you reach your goals. Our experts will help you understand the different options and how they can help you reach your goals.

**Your business. Your vision. We'll help.**  
TERM | WHOLE LIFE | IUL | UL | ANNUITIES




**Direct and personal relationships**

- Regional support**
  - Local office presence
  - Personalized service
  - Local market expertise
- Advanced Planning**
  - Tax coordination
  - Estate planning
  - Business transition
  - Annuities
  - Social Security/Medicare/IRA/401k
  - Charitable support
- Underwriting**
  - Direct access
  - CARE Act/ACA/ACA/ACA
  - Wellness program
  - Personalized service
  - Personalized support
  - Personalized support
- New Business**
  - Single point of contact from sales to service
  - Personalized support
  - Personalized support
  - Personalized support
- ONESCO**
  - Personalized service
  - Personalized support
  - Personalized support
  - Personalized support
- Annuity Sales Team**
  - Personalized service
  - Personalized support
  - Personalized support
  - Personalized support
- Sales Support Teams**
  - Personalized service
  - Personalized support
  - Personalized support
  - Personalized support

**Your business. Your vision. We'll help.**  
TERM | WHOLE LIFE | IUL | UL | ANNUITIES

**New to Ohio National?**  
Learn more about all Ohio National has to offer at [joinohionational.com](https://www.joinohionational.com).

**Your business. Your vision. We'll help.**  
IWL | WHOLE LIFE | IUL | UL | TERM | ANNUITIES | DI



# Marketing at Ohio National (15+ years of experience, through 2022)

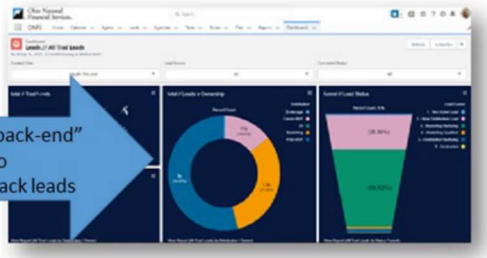
## INDUSTRY ADVERTISING CAMPAIGN, CONTINUED

Here's a sample ad journey

1. Industry ad with QR code
2. Landing page to collect info
3. "Thank you" page with link to offer
4. Offer (sales idea); offer also emailed

Then, the email address was subscribed in Salesforce Marketing Cloud and received additional email content

Salesforce "back-end" dashboard to automate/track leads



**1**

### How sharp is your life insurance trust planning saw?

As a financial professional, you help clients select the appropriate life insurance policy to achieve planning goals. Put yourself in a better position to assist by having an understanding of the various types of life insurance trusts and the ability to communicate them in simple terms. Here are three trust strategies to know:

- Reduce estate tax exposure and create tax-free liquidity with an Irrevocable Life Insurance Trust (ILIT)
- Reduce estate tax exposure, create tax-free liquidity and allow lifetime access to life insurance cash value with a Spousal Lifetime Access Trust (SLAT)
- Reduce estate tax exposure, create tax-free liquidity, allow lifetime access to life insurance cash value and enable grantor to swap assets in and out of a trust during lifetime with an Intentionally Defective Grantor Trust (IDGT)

Use the QR code to the right to get single-page concept flyers for use with clients and prospects designed to provide general education and keep the conversation going.

**GET FREE CLIENT-USE RESOURCES**

Your business. Your vision. We'll help.  
TERM | WHOLE LIFE | UL | IUL | DI | ANNUITIES

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**2**

### How sharp is your life insurance trust planning saw?

The potential for an increasing federal estate tax is reminding insurance advisors about the importance of keeping sharp. Reveal firm-tested life insurance trust strategies are once again in the spotlight.

Complete the form below and receive complimentary single-page concept flyers for use with clients and prospects designed to provide general education and keep the conversation going.

First name \*

Last name \*

Zip \* (ex. 10001)

State \*

Email \*

Phone \* (ex. 800.800.8000)

Submit

\* Required Fields  
By submitting your contact information, you agree to receive occasional updates from Ohio National. You can opt out of receiving these updates.

**3**

### Thank you!

Here are your complimentary single-page concept flyers!

Still have questions? Visit [johionational.com](http://johionational.com) for more information.

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**4**

### ESTATE PLANNING

#### Life insurance trusts

Having your lawyer or an insurance advisor determine your estate plan and protect your wealth is a critical step in your estate plan. However, if you are not involved in a well-structured and properly structured estate plan, you may be missing out on valuable life insurance trust strategies.

**What is it?**  
An ILIT is an irrevocable trust that you set up to own and control a life insurance policy. It is a trust that is set up to own and control a life insurance policy. It is a trust that is set up to own and control a life insurance policy.

**Creditor protection**  
Life insurance trusts can provide creditor protection for your beneficiaries who may have claims against the trust.

**How does it work?**  
You and your estate planning attorney establish an ILIT that you own. The trust owns the life insurance policy. You are named as the grantor. You assign a trustee to manage the trust and you are named as the beneficiary. The ILIT can own and control a life insurance policy. It can own and control a life insurance policy.

**Using an Irrevocable Life Insurance Trust**

Grantor → Life insurance policy → Trust → Policy proceeds → Heirs

- Grantor:
  - Donor (owner of the life insurance policy)
  - Transferor (owner of the life insurance policy)
  - Can make loans to the trust
- Trust:
  - Assets (life insurance policy)
  - Assets (life insurance policy)
  - Assets (life insurance policy)
- Heirs:
  - Assets (life insurance policy)
  - Assets (life insurance policy)
  - Assets (life insurance policy)

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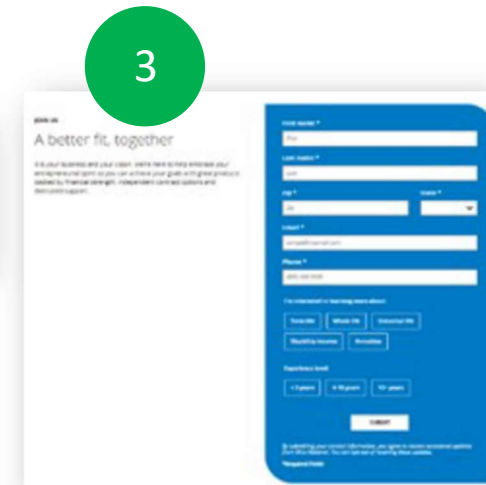
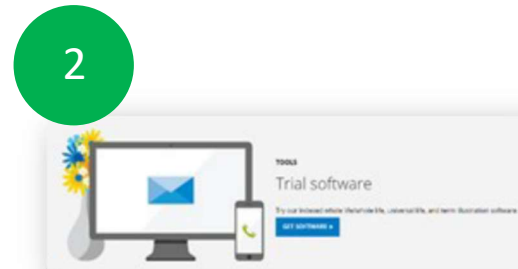
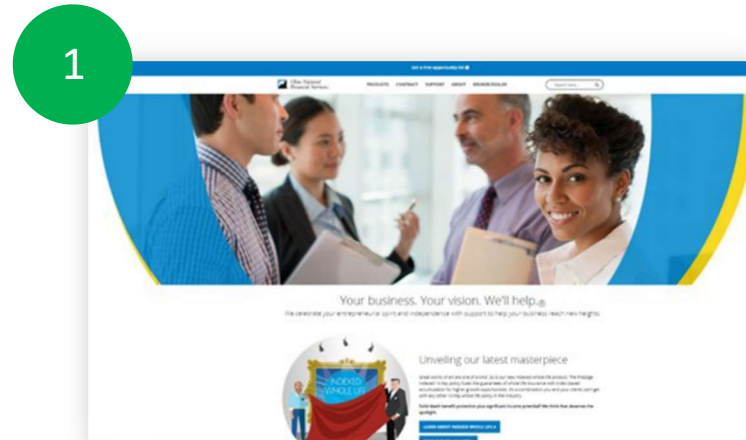
# Marketing at Ohio National (15+ years of experience, through 2022)

## INDUSTRY ADVERTISING CAMPAIGN, CONTINUED

Here's another sample of how leads were collected

1. Recruiting website at <https://www.joinohionational.com>; site was promoted in many channels and by our recruiters
2. Offer of free trial software
3. Form to collect contact info

*Please note: Since Ohio National was acquired by AuguStar, some website content may no longer be accessible or may have changed*



# Marketing at Ohio National (15+ years of experience, through 2022)

## CORPORATE PROFILE AND FINANCIAL STRENGTH

- Created 1-page flier to supplement (a much longer) annual report
- Financial professionals asked for a “quick glance” at Ohio National’s financials that they could share with their clients

## Corporate Profile and Financial Strength

Tracing our corporate origins to 1909, Ohio National is making a difference in the lives of our customers by delivering on our promises. We'll be there whenever a policy benefit is due, regardless of the economic climate.

We are committed to serving our policyholders, our associates, our financial professionals and the community. Ohio National's Mission is to make a difference in your

life by helping you achieve financial security and independence today – and for generations to come.

Through an expansive network of financial professionals across the U.S., Ohio National markets a variety of insurance products that provide important benefits and peace of mind guarantees to individuals, families and businesses.

**Benefits paid to policyholders**

More than  
**\$1.5 billion**  
paid to policyholders and beneficiaries in 2021

Benefits paid in 2021 to policyholders and beneficiaries include cash payments for life insurance benefits, payments on behalf of beneficiaries on certain annuity contracts, monthly disability income benefits, retirement plan benefits and annuity lump sum death claims and adjustments. Excludes Latin American operations.

Life insurance in force

More than  
**\$184 billion**

Assets under management

**\$40.8 billion**

Statutory total adjusted capital (ONLIC)

**\$1.5 billion**

Statutory core earnings

**\$168.2 million**

As of Dec. 31, 2021

**Product portfolio**

**Life insurance**

**Disability income insurance**

**Annuities**

**2021 at a glance**

Individual recurring life insurance premium grew by 2.4%, resulting in a 10-year compound annual growth rate of **7.9%**

Dividends paid to eligible participating whole life insurance policyholders totaled more than **\$90 million**<sup>1</sup>

Indexed universal life (IUL) sales increased by **87%**, setting a product record

Fixed indexed annuity (FIA) premium grew to **\$50.7 million**

### A history of financial strength

Our financial position is strong and reflects focus and ongoing discipline in our investment approach, risk management, operations and expense management.

**Statutory total adjusted capital (ONLIC) \$1.5 billion**

Total adjusted capital as valued by regulators to evaluate the capital strength of the company on a statutory basis.

**Statutory core earnings (ONLIC) \$168.2 million**

**General account invested assets: \$13.8 billion** (includes Latin American operations)

**Investment portfolio bond quality** (includes Latin American operations)

\* National Association of Insurance Commissioners

### Making communities stronger

More than **75** charitable organizations benefited from the volunteer and financial support of Ohio National and its associates in 2021.

The Ohio National Foundation

**\$1.6 million**

donated to nonprofit organizations in 2021

More than **\$29 million**

donated since 1987

**Mission**

To make a difference in your life by helping you achieve financial security and independence today – and for generations to come.

**Vision**

To be your company of choice – through integrity, trusted relationships and financial strength.

<sup>1</sup> Dividends are not guaranteed.

Products are issued by The Ohio National Life Insurance Company and Ohio National Life Assurance Corporation. Guarantees are based on the continuing ability of the issuer. Product, product features and rider availability vary by state. Issuer is not licensed to conduct business in NY. New York contracts issued by National Security Life and Annuity Company.

Ohio National Holdings, Inc. | Ohio National Financial Services, Inc. | The Ohio National Life Insurance Company  
Ohio National Life Assurance Corporation | National Security Life and Annuity Company  
The O.N. Equity Sales Company | Ohio National Equities, Inc. | Ohio National Seguros de Vida S.A. - Ohio  
Ohio National Seguros de Vida S.A. - Peru | Peruvian O.N.

One Financial Way | Cincinnati, Ohio 45222 | 513.794.6100 | ohionational.com  
2315 Ave. 7-22 © 2022 Ohio National Financial Services, Inc.

**Ohio National  
Financial Services.**

*Life changes. We'll be there.*

# Marketing at Ohio National (15+ years of experience, through 2022)

## MICROSITE FOR ONBOARDING AND TRAINING

- Microsite for financial professionals for on-demand access to training
- Content included quick, 5 minute “bites” and more in-depth training
- Users could subscribe to content, or recruiters could email content to financial professionals
- Also used content in email campaigns and journeys
- View microsite

<https://gateway.on24.com/wcc/eh/2503131>

*Please note: Since Ohio National was acquired, some content may no longer be accessible or may require registration*

The screenshot displays the 'ON-Board' microsite interface. At the top, the title 'ON-Board' is centered, with three circular icons below it: 'LEARN' (a play button), 'WRITE' (a document with a pencil), and 'CLOSE' (a thumbs up). Below the icons, the main content area is titled 'ON-Net & agent dashboard' and features a grid of training items. The items are categorized by duration: '5 minute bite', '20 minute session', and '60 minute webinar'. Each item includes a title, a duration, and a star icon for marking as important. Below the dashboard, there is a section titled 'Illustration training' which also displays a grid of training items, including '5 minute bite', '20 minute session', and '60 minute webinar' items. A 'View More' button is located at the bottom left of the illustration training section.

**ON-Board**

LEARN WRITE CLOSE

ON-Net & agent dashboard

5 minute bite	5 minute bite	5 minute bite	5 minute bite
OH Net first time user registration 0:05:00 A quick bite on registering OH Net for the first time.	OH Net forgot password or login ID 0:05:00 A quick bite on resetting your OH Net password or login ID.	OH Net "near" page overview 0:05:00 A quick bite on navigating the OH Net dashboard or page ID.	OH Net dashboard ID request 0:05:00 A quick bite on submitting an ID request to a supervisor for OH Net access.
20 minute session	60 minute webinar	60 minute webinar	
OH Net email setup and delivery 0:20:00 A quick bite on how to setup and deliver email through OH Net.	Health Tools 0:15:00 A quick bite on using the Health Tools feature in OH Net.	OH Net & Agent Dashboard 0:15:00 A quick bite on using the OH Net & Agent Dashboard feature.	

Illustration training

5 minute bite	5 minute bite	5 minute bite	5 minute bite
Downloading the illustration software 0:05:00 A quick bite on downloading the illustration software.	Illustrating term using the web-based software 0:05:00 A quick bite on illustrating term using the web-based software.	Illustrating whole life using the desktop software 0:05:00 A quick bite on illustrating whole life on the desktop software.	Illustrating IUL using the desktop software 0:05:00 A quick bite on illustrating IUL on the desktop software.
20 minute session	60 minute webinar	60 minute webinar	60 minute webinar
Illustrating our life products using the desktop software 0:20:00 A session on illustrating our life products on the desktop software.	Illustrating IUL: Personal case designs and sales ideas 0:10:00 Are you unsure of how an IUL product could serve your client best? Maybe you have specific questions about how our product would. Whatever questions you may...	Term portfolio and basic quotes 0:05:00 A quick bite on illustrating term portfolio and basic quotes.	Whole Life Illustrations 0:05:00 A deep dive into our Prestige Whole Life product portfolio.

View More

# Marketing at Ohio National (15+ years of experience, through 2022)

## INTERACTIVE BUSINESS DEVELOPMENT MODULES

- Modules included:
  - Vision and mission
  - Recruiting value
  - Recruiting activity
  - Five markets
  - Diverse recruiting
  - Interview guide
- Developed for agencies/firms to learn about and document business development activities
- For use by trainers in small groups

**Document Your Recruiting Value Proposition**

This module contains four tools designed to assist a General Agent and their management team to identify and document their value proposition.

**Overview**

**Overview presentation**

**Testimonials**

**Exercise**

**Tips to best use these tools:**

- Connect with your Regional Officer on the best ways to use and position this module
- Use in a group session with your entire management team, other key associates and/or Ohio National home office partners
- Be sure all on your management team are actively aware of your recruiting value proposition
- The exercise is the most important tool in this module and should be used with either the overview or overview presentation
- Execution is the key, so you must have regular follow-up meetings to confirm everyone is on the same page

Not a guarantee of success. Individual results will vary.  
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FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR USE WITH THE GENERAL PUBLIC.

**DOCUMENT YOUR RECRUITING VALUE PROPOSITION**

**Exercise**

**Action plan**

Date: \_\_\_\_\_

Objective: \_\_\_\_\_

Owner/responsible individual: \_\_\_\_\_

Prepared by: \_\_\_\_\_

**All candidates: Why should I join your agency instead of your competitor?**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**From the previous lists, summarize the top reasons a candidate should join your agency:**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Using the above summarized reasons, a candidate should join your agency, create a statement that best describes your value proposition. With your team, role play sharing this statement.**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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**Ohio National Financial Services.**







# Marketing at Ohio National (15+ years of experience, through 2022)

## THOUGHT LEADERSHIP/PRESS RELEASE CONTENT

- Broker World 2022 Carrier Forecast

<https://brokerworldmag.com/ohio-national-2022-carrier-forecast/>

- Press release re: new websites

<https://www.globenewswire.com/news-release/2021/10/07/2310600/0/en/Ohio-National-launches-new-websites-for-prospective-financial-professionals.html>

- Thought leadership article

<https://www.financial-planning.com/opinion/the-inflation-effect-on-fixed-indexed-annuities>

**BROKER WORLD**

### Ohio National 2022 Carrier Forecast

By Barbara A. Turner | January 1, 2022

In November 2020, I wrote that 2020 was a year that no one saw coming. We had experienced a global pandemic, continued low interest rates and increased market volatility. Many believed that things had to improve for 2021, that the pandemic would wind down, and the new year would bring great things to our industry and economy.

Unfortunately, 2021 presented many of the same challenges as 2020—and a good deal more. While I was hoping for a calmer year, I remain very optimistic about the future of our industry. Life insurance will continue to play a valuable role in supporting the nation's economy and, most importantly, our policyholders.

I am proud to have the opportunity to lead an organization like Ohio National, where our Mission centers on helping individuals, families, businesses and communities achieve financial security and independence. I am also excited about what lies ahead for us.

**Ohio National Financial Services**  
*Life changes. We'll be there.®*

Source: Ohio National Financial Services  
October 07, 2021 10:00 ET

### Ohio National launches new websites for prospective financial professionals

Clean-sheer, mobile-optimized site redesigns offer personalized content, increased functionality, and timely look and feel

Website redesigns facilitate seamless, productive communication between Ohio National and prospective financial professionals

New websites adhere to Ohio National's continuing philosophy for engaging financial professionals: It's their business, their vision, and we can help.

CINCINNATI, Oct. 07, 2021 (GLOBE NEWSWIRE) — Ohio National Financial Services is pleased to announce the relaunch of its two recruiting websites for financial professionals.

The all-new joinohio.com gives prospective financial professionals a look into the independent contract options and insurance products backed by the financial strength of Ohio National, including life and disability income insurance and annuities.

The other redesigned site, joinosco.com, provides a 360-degree view of the company's affiliated full-service broker/dealer, The O.N. Equity Sales Company (ONESCO).

These key assets in the company's digital space are engineered from the ground up to give visitors access to intuitive decision-making tools and actionable information. "Our goal with these sites is to make it easier for financial professionals and entrepreneurs to learn exactly what they can expect from us, in terms of product, service and philosophy," said Jill Hartmann, vice president of distribution marketing and communications. "We appreciate that it's their business and their vision. What we want to convey is how we can help. The new sites do just that in an environment that's quick to navigate, imaginative and full of useful information."

Both sites follow a fresh, approachable design aesthetic that incorporates expressive illustrations, relatable characters and concise messages that can be read at a glance.

New and enhanced site functionality includes:

**Financial Planning**

TAX INVESTING ▾ PRACTICE MANAGEMENT ▾ REGULATION AND COMPLIANCE ▾ TECH ▾ INDUSTRY ▾ OPINION ▾

RETIREMENT

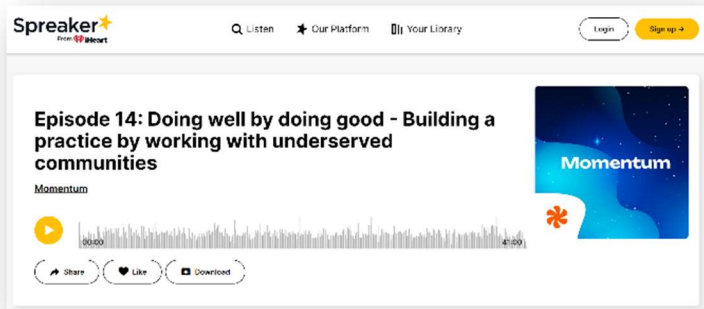
### Voices The inflation effect on fixed indexed annuities

By John Grevas | February 22, 2022, 7:22 p.m. EST | 4 Min Read

# Marketing at Ohio National (15+ years of experience, through 2022)

## ADDITIONAL MARKETING CONTENT

- Webinar registration (via ON24)
- Customizable marketing materials
- Regional meeting promotion
- “How much life insurance do I need?” client video  
<https://vimeo.com/339587419>
- “Take a look at Ohio National” field video  
<https://vimeo.com/762753197/7c5ae7db7f>
- DE&I podcast: “Doing well by doing good”  
<https://www.spreaker.com/episode/episode-14-doing-well-by-doing-good-building-a-practice-by-working-with-underserved-communities-45727117>



The image shows a webinar registration page. The header features the title 'Your IUL roadmap: From structure to sale' and dates 'June 17, June 24 and July 1'. Below the header, there is a 'Webcasts' section with a list of available webcasts, including 'Ohio National Virtus II IUL: The foundation'. A 'Register Now' section contains input fields for 'First Name' and 'Last Name'. To the right, an 'Overview' section provides details: 'Title: Ohio National Virtus II IUL: The foundation', 'Duration: 1 hour, 15 minutes', and 'Available On Demand'. A 'Summary' section asks if the user is unsure of how an IUL product could serve their client. A 'Topics covered in the series include:' section lists 'Understanding our Ohio National Virtus II IUL product features', 'Illustrating IUL personal case designs', and 'Advanced Planning sales ideas'. A 'Speakers' section is also present.

The image shows a video thumbnail for 'Different levels of coverage for different budgets'. It features a woman in a white lab coat talking on a phone. The text 'DIFFERENT LEVELS OF COVERAGE FOR DIFFERENT BUDGETS' is prominently displayed. Below the title, it says 'Click Range, approved and sold by AIA Insurance' and lists 'JAMES HARRIS, Esq.' and 'JAMES HARRIS, Esq.' with a phone number and email address. The AIA Insurance logo and 'Ohio National Financial Services' are at the bottom.

The image shows a field video thumbnail. The title is 'Ohio National is headed to a city near you!'. It features a signpost with arrows pointing to various cities: Philadelphia, Denver, St. Louis, Dallas, Scottsdale, Atlanta, Tampa, and New Orleans. To the right, a 'See you there!' section lists dates and locations for field events, such as 'Aug. 14 St. Louis, MO' and 'Sept. 19 Raleigh, NC'.

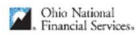


The image shows a video thumbnail for 'Take a look at Ohio National'. It features a man in a suit and glasses speaking. The text 'Take a look at Ohio National' is at the top. Below the video, there is a list of three points: '1. Innovative products', '2. Fluidless underwriting', and '3. Financial strength'.

# Marketing at Ohio National (15+ years of experience, through 2022)

## ADDITIONAL MARKETING CONTENT

- Event planning and management
- Policyholder communications
- Email campaigns



ON News

Register now | Sept. 8 at 2 p.m. EDT

# Thank you!

**Linked in**

<https://www.linkedin.com/in/jillhartmann/>

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