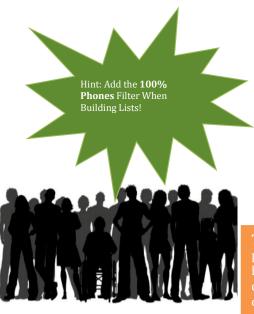# Build Opportunity Lists Across Your Policyholder Book of Business
Use the Filters to Uncover Opportunities at the Policy Level

1. From the MarketEDGE360 home page, click the **Marketing Programs Directory**, located in the top left corner.

2. In the drop-down box, select **List Builder**, then **Your Policies,** then select the policy type (Life, Disability, LTC, Investments & Annuities).

3. The Agreement Screen will appear next. Select **I Agree**, and click **Next Step**.

4. The Sales Opportunity screen will allow multiple selections based on the targeted criteria. You can search by two main criteria: Geographic and Other.

5. Once all the filters have been applied, click **Next Step.**

6. On the Delivery screen, edit the name of your list and click **Add to cart.**

7. From the Your Cart screen click **Checkout.**

8. From the Payments screen, review your order and then click **Submit Order.**

List Builder ▶	Consumer Prospect	Life Policyholders
Direct Mail ▶	Business Prospect	Disability Policyholders
Email ▶	Your Policies, Contracts & Accounts ▶	LTC Policyholders
Ad-Builder	Your Clients	Investments & Annuities
Sign Up for a Subscription ▶	Financial Representative Recruits	

Hint: Add the **100% Phones** Filter When Building Lists!

Geographic
City Search
County Search
Nearest Neighbors Street Search
Radius Distance Search
State Search
Zip Code By County Search
ZIP Code by State Search

Tip: Use List Builder to Increase policyholder engagement, target high potential policies or to start discussions about cross-offeringprograms!

Life Policies
100% Phones
All Accounts
Annualized Premium Range (Life)
GIO Rider
Guardian Small Business Product
Insured Age Range
Loan Amount Range
Net Cash Value Range
Orphan Policy Indicator
Owner Age Range
Insured Policy Anniversary Month
Policy Tenure
Producer Name
Producer Type
Take Advantage Eligible Client
Term Conversion Eligible Client
Total Death Benefit Range
Type of Life Insurance
Waiver of Premium Rider

Disability Policies
100% Phones
All Accounts
Annualized Premium Range (Disability)
FIO Eligible
Guardian Small Business Product
Insured Annual Salary
Occupation Class
Orphan Policy Indicator
Owner Age Range
Insured Policy Anniversary Month
Policy Issue State
Policy Tenure
Producer Name
Producer Type
Total Risk Amount
Type Of DI Insurance

LTC Policies
100% Phones
All Accounts
Annualized Premium Range (LTC)
Guardian Small Business Product
Max Benefit Amount
Orphan Policy Indicator
Owner Age Range
Insured Policy Anniversary Month
Policy Issue State
Policy Tenure
Producer Name
Producer Type

Investments & Annuities
100% Phones
All Accounts
Annuity Amount Paid to Date Range
Guardian Small Business Product
Market Value Range (Annuity)
Orphan Policy Indicator
Owner Age Range
Account Tenure
Producer Name
Producer Type
Owns Fixed Annuity Product
Owns Retirement PAS Product
Owns Non-Retirement PAS Product