



MORE THAN AN **INSURANCE APP.**



Built by **an agent.**



Designed for **real life.**



Clients stay **organized.**

Medications. Doctors.
Insurance cards. All in one place.



Families stay **prepared.**

Emergency access. Critical info.
Ready when it matters most.



Agents stay **connected.**

Stronger relationships. Referrals.
Tools that help you grow.



Prepared.



Protected.



Connected.



myvitalink.app

THE ANNUAL REVIEW CONVERSATION

“Nothing has changed.”



Until you start asking questions.



The Annual Review *Problem* **BUT IT HAS.**

Usually, several things changed.

Medications, providers, insurance cards, contact information, or emergency contacts.



New medication?

Not written down.



New doctor?

Can't remember the name.



Hospital stay?

Forgot to mention it.



myvitalink.app

THE **GAP** BETWEEN ANNUAL REVIEWS

Life doesn't wait for annual reviews.



LAST REVIEW

- ✓ Medications updated
- ✓ Doctors confirmed
- ✓ Policies reviewed
- ✓ Claims discussed
- ✓ Referrals requested



TODAY

- ! New medications
- ! New specialists
- ! Hospital stays
- ! Forgotten policies
- ! Missed claims
- ! Lost referrals



VitaLink

Important information changes throughout the year, but agents often don't learn about those changes until the next appointment.

VitaLink helps **bridge that gap** by giving clients a simple way to keep information organized, updated, and available whenever it's needed—while helping agents **stay connected** between reviews.



**BUILT BY A REAL AGENT.
DESIGNED FOR REAL LIFE.**



Prepared.



Protected.



Connected.



myvitalink.app

THE REAL CLIENT PROBLEM

Their information is everywhere.

Important details are scattered in multiple places, hard to find when they need them most.

- Wallets
- Drawers
- Sticky notes
- Filing cabinets
- Phone calls



All your important information. **One secure place.**

CLIENT ORGANIZATION

One place for medications

Medication Information

Scan a medication label and VitaLink automatically captures medication details, dosage information, frequency, and pharmacy data. Records stay organized, accurate, and available whenever they're needed.



✓ Scan medication labels in seconds



✓ AI extracts medication details automatically



✓ Captures medication, dosage & frequency



✓ Pharmacy information stored automatically



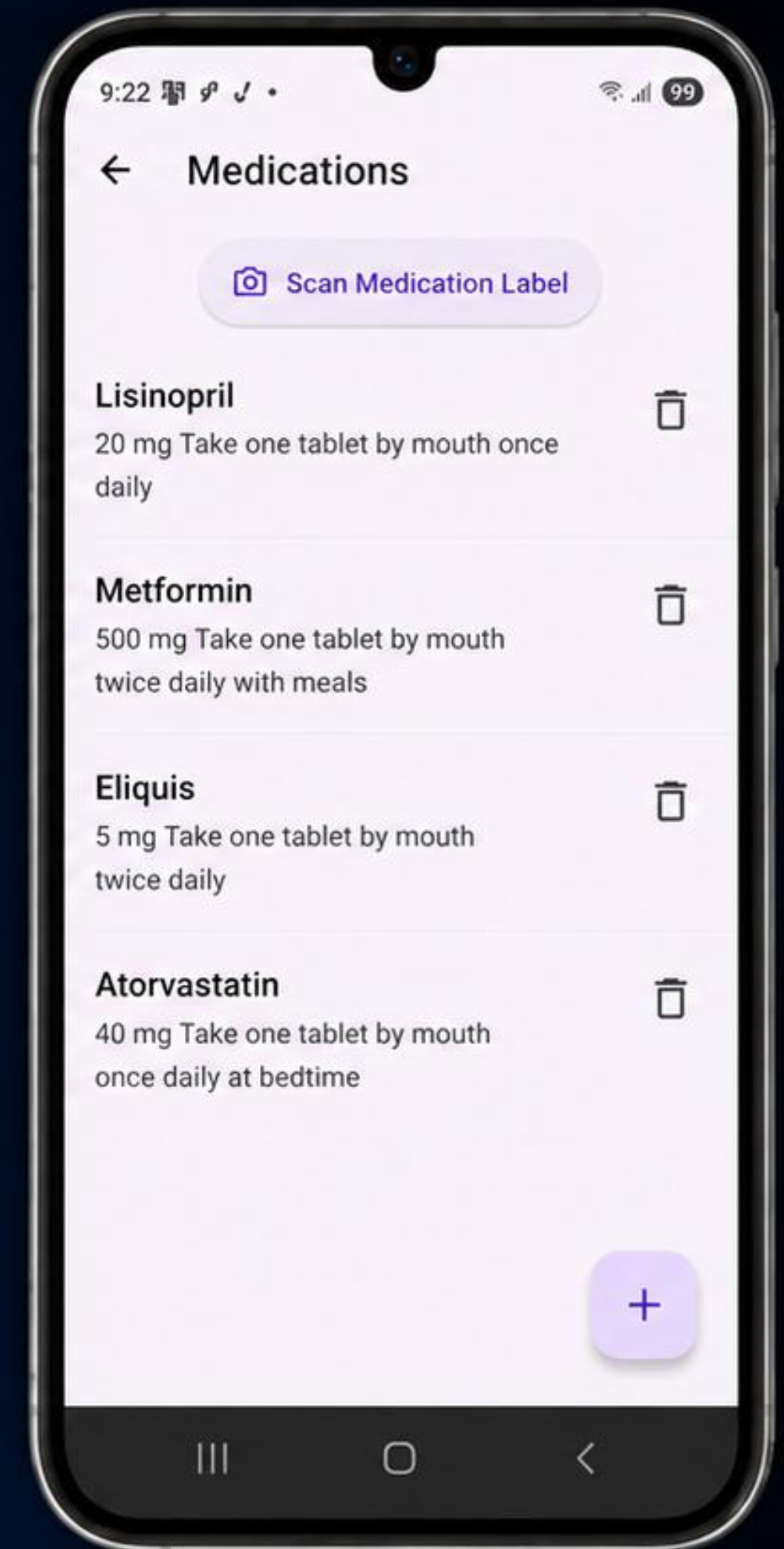
✓ Duplicate medication warnings

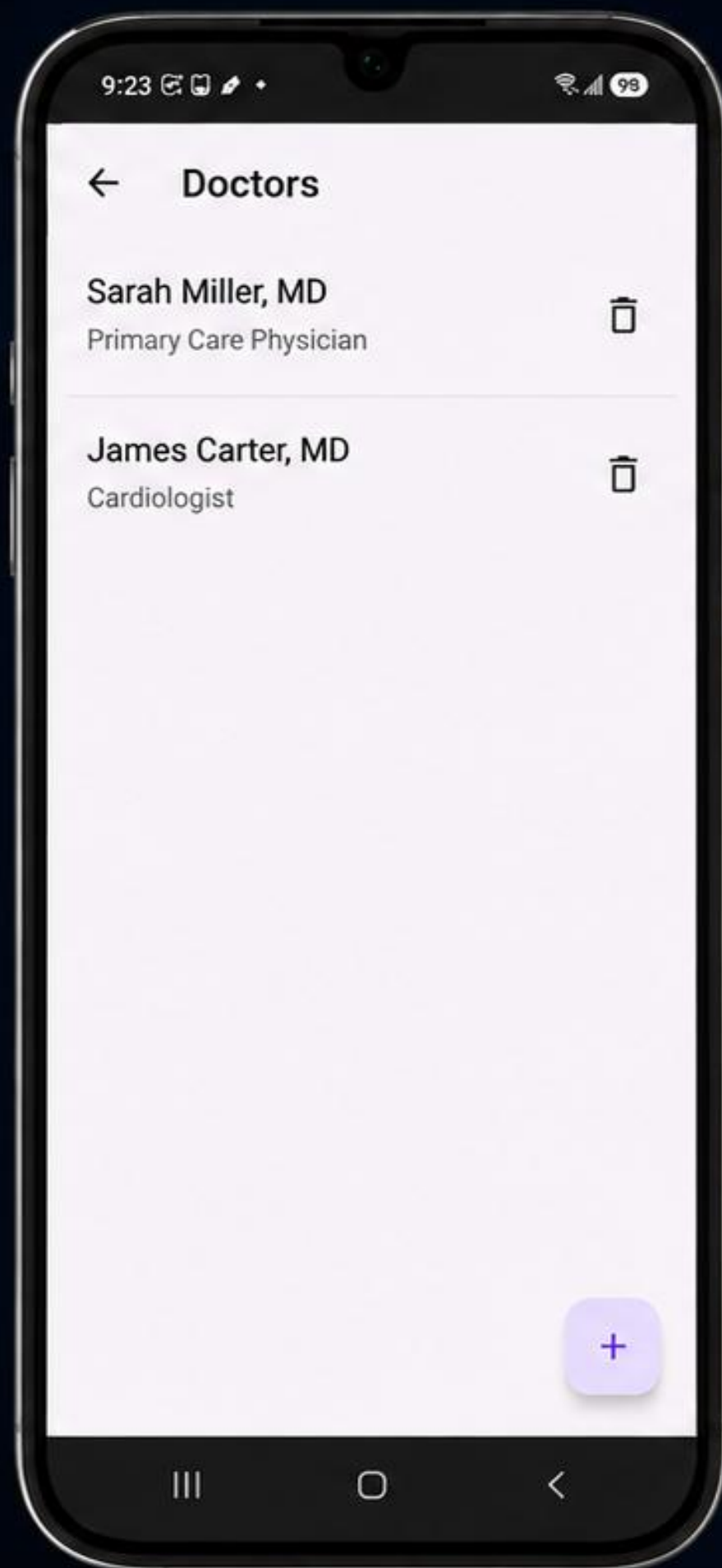


✓ Update medication records anytime



✓ Keep all medications in **one place**





One place for doctors

Provider Information

Primary care physicians, specialists, phone numbers, and provider details are available whenever they're needed. VitaLink can automatically identify providers from prescription labels and lets users add or update information at any time.



✓ **AI extracts** provider names from prescription labels



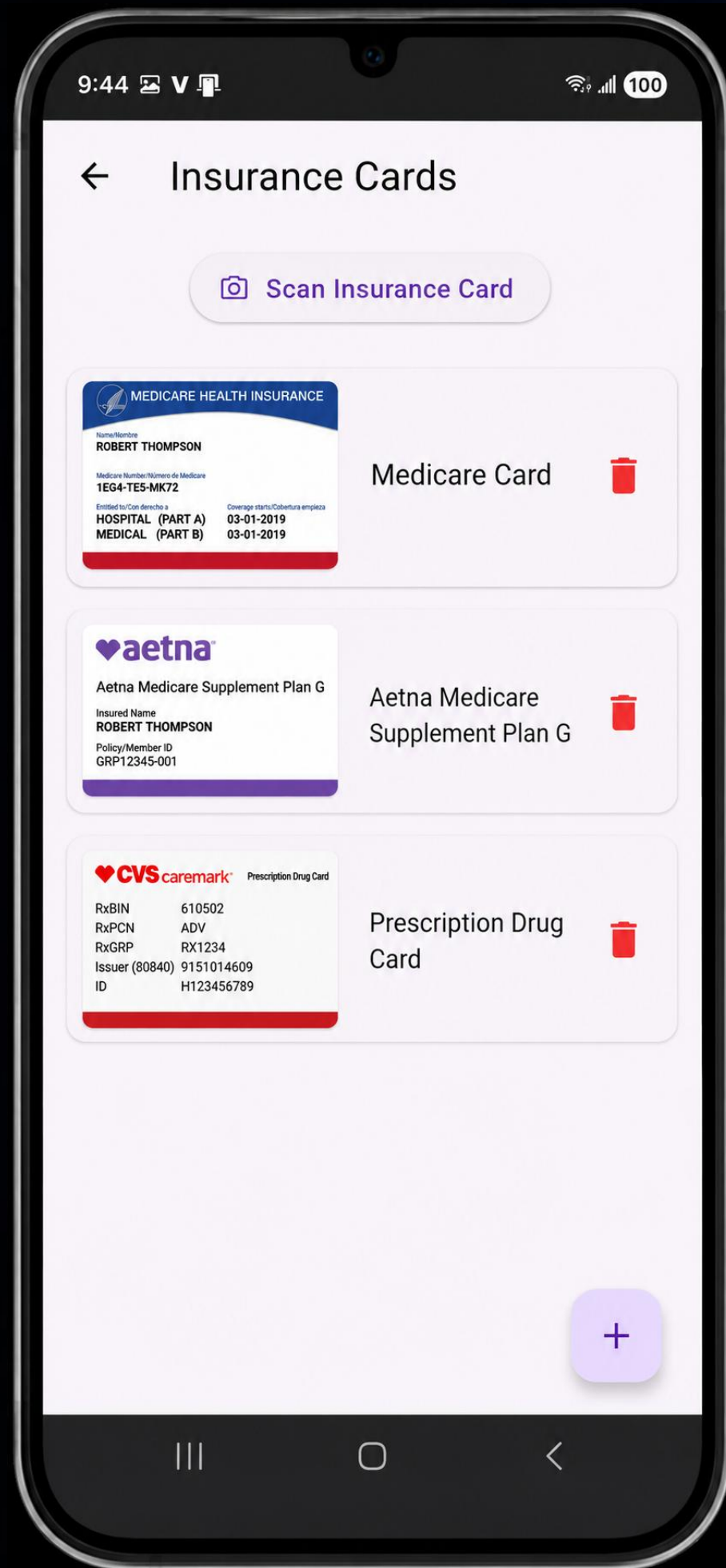
✓ **Primary care & specialists** stored



✓ **Manual additions & edits** anytime



✓ **Add or update** providers anytime



One place for insurance cards

Insurance Card Information

Scan your insurance card and VitaLink captures and organizes your coverage details, connects copays to your plan, and keeps everything easy to access and share.

- ✓ Scan insurance card in seconds
- ✓ AI parses and organizes all card details
- ✓ Captures both front and back of the card
- ✓ Share card securely from the app
- ✓ Copays matched to your plan from the card
- ✓ Keep all insurance cards in one place
- ✓ Add or update cards anytime

FRONT



BACK



COPAYS (MATCHED TO PLAN)

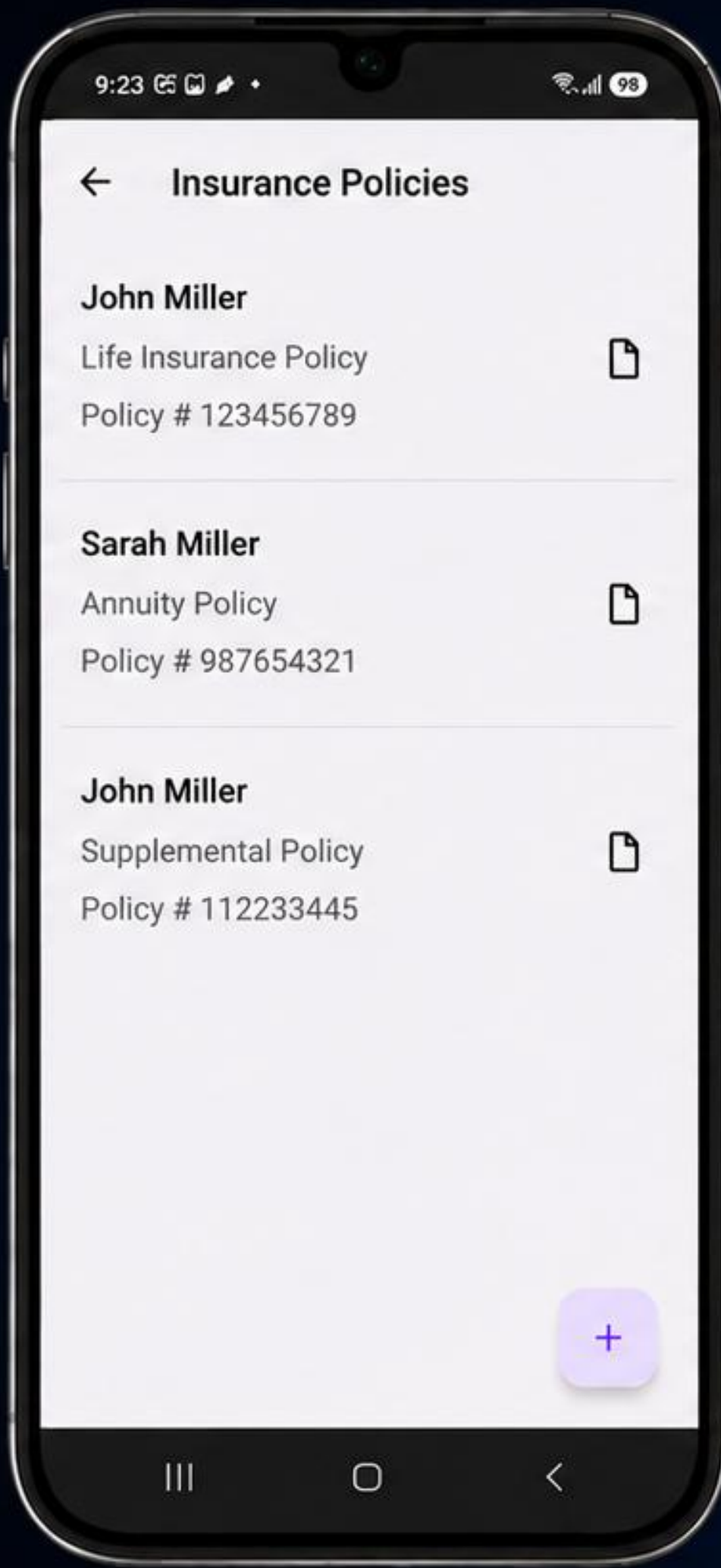
Primary Care Visit	\$25	Urgent Care	\$75	Generic (Preferred)	\$10
Specialist Visit	\$45	Emergency Room	\$250	Brand (Preferred)	\$40



One place for insurance policies

Policy Information

Store life insurance, annuity, supplemental, and other policy documents in one secure location. **VitaLink** uses AI to organize policy details, making information easy to access whenever it is needed.



-  ✓ **Life, annuity & supplemental** policies stored
-  ✓ **AI extracts** policy details automatically
-  ✓ **Family** can locate policies when needed
-  ✓ **Add or update** policies anytime

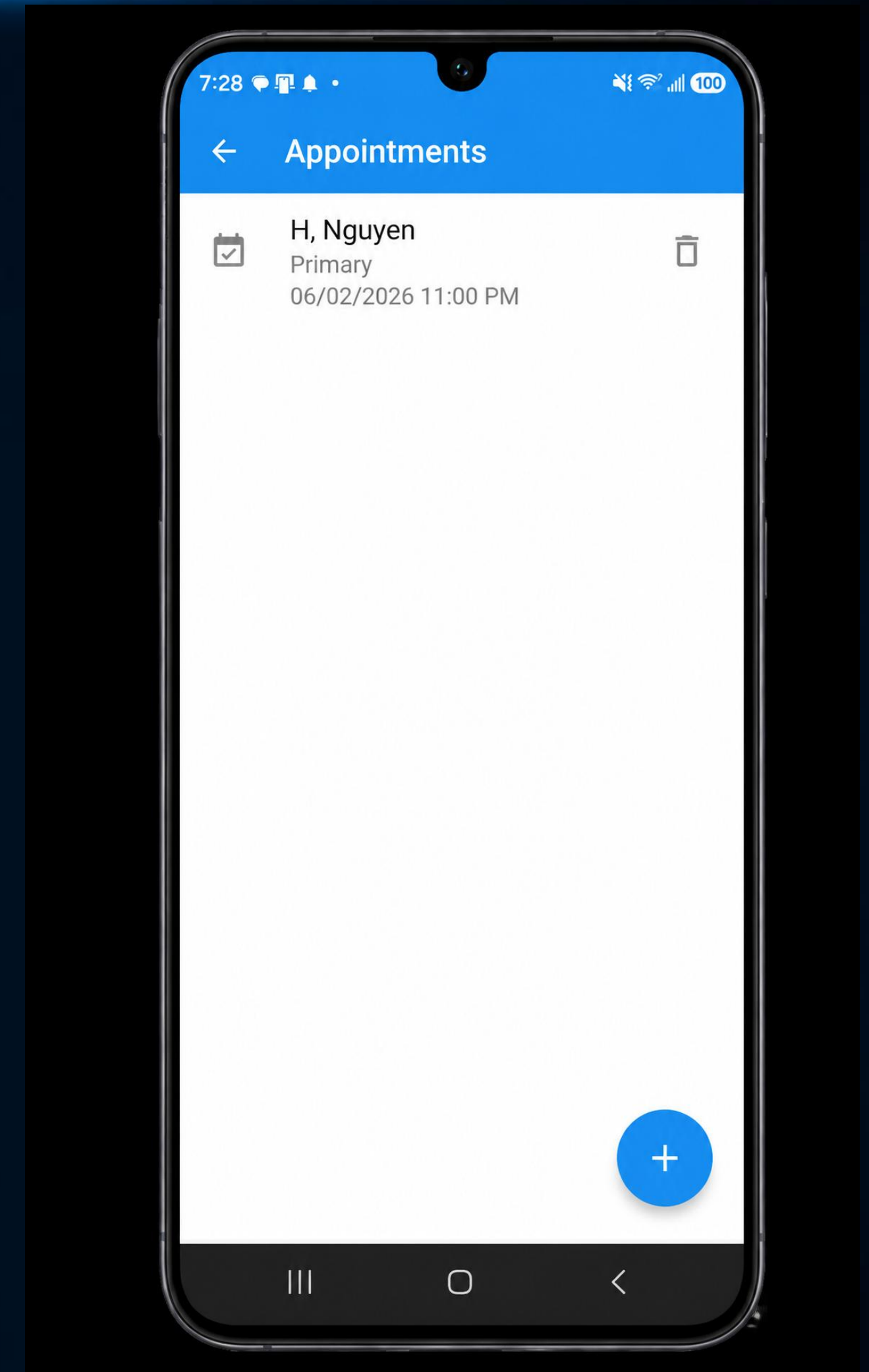
DAILY UTILITY

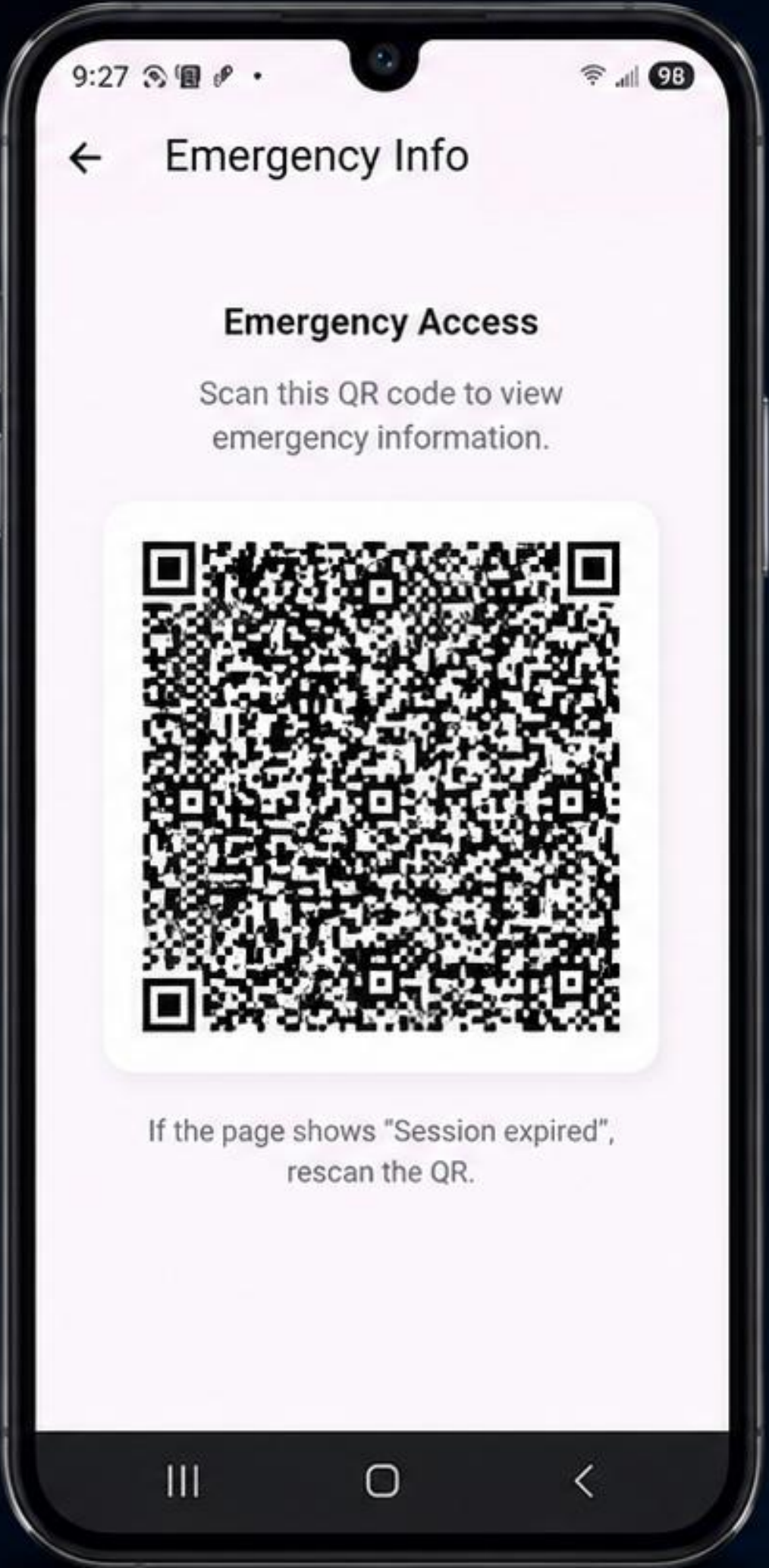
One place for appointments

Appointment Management

Keep doctor visits, follow-ups, annual reviews, and important reminders organized in one place. **VitaLink** helps users stay prepared and ensures important appointments are never overlooked.

	✓ Doctor visits & annual reviews stored
	✓ Provider information linked to appointments
	✓ Stay prepared for upcoming visits
	✓ Add or update appointments anytime











EMERGENCY ACCESS

What happens if they can't speak?

When every second matters, emergency responders and loved ones need immediate access to critical health information.

-  ✓ **Emergency QR** available 24/7
-  ✓ **Allergies, medications & conditions**
-  ✓ **Emergency contacts** instantly accessible
-  ✓ **Physicians, devices & medical history**
-  ✓ **Secure mobile access** from any phone
-  ✓ **Critical information** when seconds matter

AGENT WORKFLOW

Faster annual reviews

Clients can securely send contact information, medication lists, doctors, HIPAA authorization, and Scope of Appointment directly to their agent.



HIPAA
Authorization



SOA
Scope of Appointment



Meds list
Medication information



Doctor list
Provider information

10:12 93

← HIPAA & SOA Authorization

The date signed unless revoked earlier.

MEDICARE SCOPE OF APPOINTMENT (CMS Required)

I agree to discuss the following Medicare product types with my licensed agent:

- Medicare Advantage
- Medicare Supplement
- Prescription Drug Plans
- Dental and Vision Plans
- Hearing Plans

I understand that:

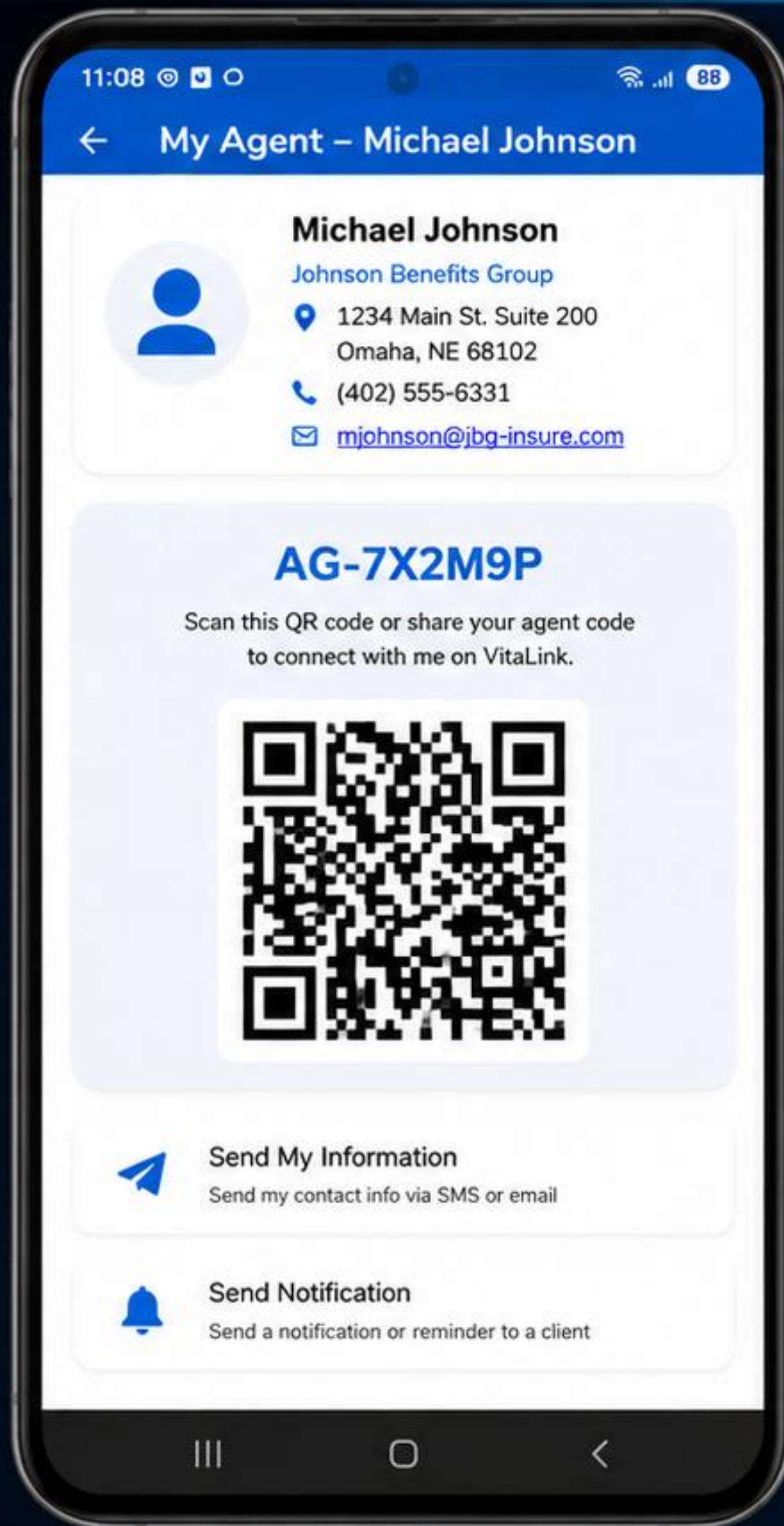
- I am not required to enroll in any plan.
- I may meet with my agent about any plan type I choose.
- My signature allows my agent to collect, store, store, and use my health information for twelve (12) months unless revoked.

Sign Authorization

Clear Cancel Submit

I acknowledge and authorize my agent as described above.







> Sign & Send My Information



AGENT RELATIONSHIP

Never lose touch after enrollment

Your contact information stays with clients year-round. Phone numbers, email, office location, appointment scheduling, notifications, and referrals are always just a tap away.

	One-Tap Calling	Clients can reach you instantly
	Email Access	Contact information always available
	Office Information	Address and directions stored
	Send Notifications	Reminders and updates anytime
	Appointment Scheduling	Easier annual reviews
	Referral Sharing	Clients can connect friends directly

Built by an agent. For agents.



Why VitaLink?

"Built from real annual review challenges, not boardroom assumptions."



CREATED AFTER YEARS OF:

- ✓ Annual Reviews
- ✓ Enrollment Appointments
- ✓ Client Service Calls
- ✓ AEP Meetings



REVIEWED BY:

- ✓ Nurses
- ✓ Hospital Intake Personnel
- ✓ First Responders



Client Management

View connected clients in **one place**



Optional CRM Available

Manage prospects, notes, tasks, and follow-ups in your **CRM**



Secure Data Requests

Request HIPAA, SOA, medications, and provider information **securely**



Client Notifications

Send **reminders, updates,** and important announcements



Agent Portal Included

Dedicated web dashboard with powerful **agent tools**









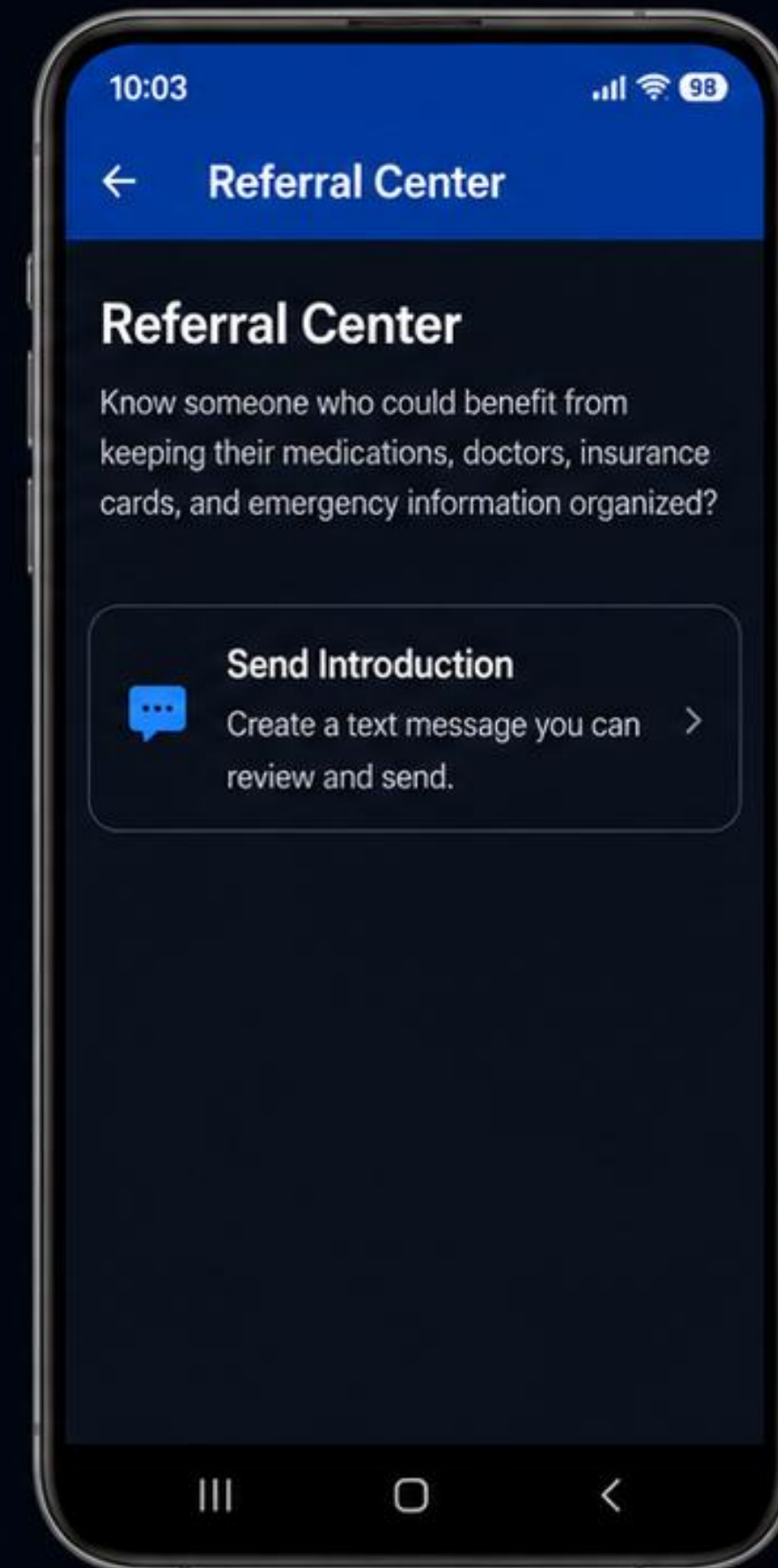
Better Retention

Simplify annual reviews and strengthen **client relationships**

Turn Happy Clients Into Leads.

A simple referral system built directly into VitaLink. Clients can introduce friends and family with a few taps. Referrals choose how they want to be contacted, and you receive qualified leads instantly—**no account setup required.**

	Client Sends Referral	Easy referral process built right into VitaLink.
	Contact Preference Captured	Referrals choose TEXT or CALL .
	Direct Agent Connection	Referrals connect directly to you—no middleman.
	Instant Lead Notifications	You receive a notification the moment a lead is sent.
	No Account Required	No app to download. No account to create.
	Built Into VitaLink	Everything you need is already in one place .



*Simple for clients.
Powerful for agents.*





MORE THAN AN INSURANCE APP.

PREPARED • **PROTECTED** • **CONNECTED**

Helping clients stay organized, prepared for emergencies,
and connected to the people who matter most.



PREPARED

- ✓ Medications organized
- ✓ Insurance cards available
- ✓ Doctor information stored

Everything you need,
all in one place.



PROTECTED

- ✓ Emergency QR access
- ✓ Critical medical details available instantly
- ✓ Better emergency response

The right information.
When seconds matter.



CONNECTED

- ✓ Agent information always available
- ✓ Family & caregiver support
- ✓ Stronger client relationships year-round

Everyone connected.
Always in the loop.



VitaLink

Built by an agent. Designed for real life.

VitaLink was built by an agent who saw a better way
to protect clients and grow stronger relationships.
It's time for a better connection.



myvitalink.app

FOUNDERS PRICING

First 1,000 agents

Be a Founder. Build the Future.

Join the first 1,000 agents and lock in special founder pricing forever. Help shape VitaLink while growing your business.



Locked In Pricing

Founders pricing is locked in for as long as you stay active with VitaLink.



First 1,000 Agents

This exclusive pricing is only available to the first 1,000 agents who join VitaLink.

★ **FOUNDERS**
FIRST 1,000 AGENTS

Founding Agent

\$10 /month

LOCKED IN FOREVER

- ✓ Lock in founder pricing for as long as you're active
- ✓ Help shape VitaLink with early feedback
- ✓ Priority support from our founding team

BEST ENTRY POINT

Standard Agent

\$20 /month

SIMPLE MONTHLY PRICING

- ✓ Full access to VitaLink app
- ✓ Secure client management
- ✓ Insurance cards & policies
- ✓ Doctor & pharmacy search
- ✓ Agent tools & resources
- ✓ Standard support

VitaLink APP/CRM

\$40 /month

ALL-IN-ONE SOLUTION

- ✓ Everything in the app
- ✓ Advanced CRM features
- ✓ Client organization & tracking
- ✓ Task & follow-up management
- ✓ Notes, reminders & activity log
- ✓ Team & organization tools
- ✓ Priority support



Be Part of Something Big

VitaLink is built by agents, for agents. Your feedback helps us build the tools you need to grow your business.

Get Started Today

Join VitaLink and secure your founder pricing now.

myvitalink.app



VitaLink
myvitalink.app