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The \$30M Case That Changed Everything:
How AI Helps the Veteran Agent Unlock Hidden Opportunities



Mike Shean | The Dormie Group, Chicago

Experience: 25+ years in life insurance

Specialty: Complex, high-net-worth planning (\$15M+ clients)

Style: Entrepreneurial, legacy-focused, golf-networked rainmaker

“Adapt or be replaced”

That was Mike Shean's mindset about AI before he encountered Optifino. After nearly 30 years in the life insurance business, he knew the industry's slow pace of innovation couldn't continue. He didn't expect AI to accelerate his career, but that's exactly what happened.

Putting Together a Winning Team

At a Finseca conference, Shean met Mike Doniger, Co-Founder and Chief Innovation Officer of Optifino. Doniger introduced the Optifino platform—an AI-powered engine for case design, product analysis, and real-time planning.

For Shean, what began as skepticism quickly evolved into curiosity. “My first thought was, ‘This is what’s going to replace me.’ Then I realized—this could make me better.”

Over the following months, as Shean explored the system deeper, his outlook shifted.

“It was like someone opened a door to a room I didn’t know existed. Suddenly, I wasn’t limited by old processes or outdated tools.”

Transitioning the Planning Process

Shean's clients have complex needs, including estate plans, legacy structures, and nuanced trust strategies. Previously, he had accepted the industry's inefficiencies in dealing with these cases as hurdles he just had to live with:

- Long delays between design requests and delivery
- Narrow product access bound by BGA politics
- Limited insights into optimal solutions

Optifino flipped that script. Now, Mike compares thousands of policies in real time, makes dynamic adjustments during client meetings, and eliminates clunky back-and-forth. "The impact goes beyond efficiency to enhance my insight and control. I'm more responsive and more confident."

Why Optifino



AI-driven, real-time product comparisons



Faster, more confident client interactions



Expanded access beyond traditional BGA models



Legacy and estate planning made scalable

Offering AI-Backed Solutions as a True Independent

The transformation was both philosophical and operational. Shean is no longer boxed in by the culture of "this is how it's always been done." He sees Optifino as a tool to amplify his strengths, not replace them.

"There are no limits except the ones I put on myself."

One early case proved the platform's value: a client had been denied additional coverage by five carriers. Optifino's team discovered that no one from Shean's former BGA had even called the carrier who had previously issued him \$10M. That call secured an additional \$30M within a month.

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