

Insurance Review

Life involves many kinds of risk. Some may be easily borne while others can destroy your plans. Insurance may be an effective way to discount your cost by spreading the risk among a much larger base. The following process will help identify your exposure to risks that may hurt you or your family and make sure they are adequately covered.

- Discovery of values-based goals (Who do you want to benefit and why? What do you want to happen?)
- Determination of existing and future income sources and amounts
- Review of existing insurance policies
- Examination of risks covered
 - Personal
 - Income
 - Other Assets
 - Health
 - Investments
 - Liabilities (debt/legal)
 - Death
 - Business
 - Key Employee Retention
 - Key Employee Replacement (death/disability)
 - Overhead Expenses
 - Business Liabilities
 - Other Business Assets
- Discussion of risks not covered
- Evaluation of funding alternatives for uncovered risks
- Implementation of acceptable solutions for uncovered risks

Why not make sure that there are no significant cracks in the foundation of your financial plan by completing our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time?

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!