

LIFE INSURANCE IS ONE OF THE MOST IMPORTANT FINANCIAL PLANNING INSTRUMENTS YOU OWN.

Due to substantial product & underwriting improvements, many in-force life insurance contracts may no longer provide the most efficient solution.



For Your Life Audit Contact:

Life Insurance Audit

**ARE YOU
CERTAIN YOUR
PRESENT
POLICY IS THE
BEST POSSIBLE
SOLUTION
AVAILABLE?**

Life Insurance Audit

Are You Certain Your Present Policy Is The Best Possible Solution Available?

Life insurance is an asset that must be managed.

Most people have no procedures or guidelines in place to review their life insurance policies.

We provide you the independent review you need to fully understand your life insurance.

For Your Life Audit Contact:

1.Data Acquisition—Collect necessary information about your life insurance policy and general understanding of any health issues.

2.Premium Funding Analysis—we will determine the projected premium required to maintain your policy until maturity.

3.Marketplace Analysis—we will perform a comparison of your carrier & policy versus other carriers to get the best policy for your situation.

4.Life Audit—Review with you our recommendations about policy performance, carrier strength, product evaluation proper policy ownership & beneficiary changes.

5.Goal Review—Understanding the goals and needs of your life insurance for your beneficiaries.

6.Optimization—Aligning your goals to provide a solution which will provide transparency & enhancement of your life insurance holdings.

