



FEE-BASED AND FEE-ONLY ADVISOR INSURANCE SERVICES

CONSULTATIVE, UNBIASED SOLUTIONS

Our team recognizes the unique distinctions amongst the fee-only and fee-based RIAs we work with. Our relationship with you first starts with a deep discovery of your practice and the method and manner in which you serve clients. We deliver efficient and scalable insurance solutions on your behalf to help you elevate your client experience and offer more complete planning.

FEE-ONLY ADVISORS

We work directly with you and your client to consult on insurance solutions and execute agreed upon planning strategies on your behalf. Our services are designed with the highest level of sensitivity to your fiduciary role. We communicate on every aspect of the solutions we recommend and are fully transparent in our process. As an independent partner, we focus on your clients' best interest, not a particular company's best interest.

FEE-BASED ADVISORS

Our team works with you to determine an insurance services model that best fits your practice. We can work alongside you during client conversations or be a resource to you as case consultants. If you prefer to refer clients directly to us to solve their needs, we will do so with the utmost care, personal attention and proactive communication your clients expect from you. We are straight-forward and transparent in our approach and treat each of your needs with urgency.

ENHANCING YOUR CLIENT EXPERIENCE

We are a consultative resource helping you deliver unbiased insurance solutions to help minimize your clients' risk, maximize available planning techniques and complement your strategies, without diverting your focus. We are an extension of your team, helping you efficiently protect your clients' assets, lifestyle and financial security.