



Summary of Services

Employee Benefits

Group Health, Dental, Vision, Life, Disability, and Worksite Benefits

Individual Insurance

Life Insurance
Home & Auto, etc.
Disability
Long Term Care

Commercial Insurance

General Liability
Business Owners Policy (BOP)
Workers Compensation
Commercial Auto
Errors & Omissions (Professional Liability) Bonds

Investment Planning

529 Education Plans
Asset Management
Portfolio Analysis
Annuities

Business Planning

Buy-Sell Agreements
Disability Overhead Coverage
Key-Person Life Insurance
Executive Bonus Plan Section 162
Private Pension
Deferred Compensation

Estate Planning

Analysis of Estate Tax –
in conjunction with CPA and Attorney
Use of Trusts, Family Partnerships

Retirement Plans

401(k), 403(b)
SEP IRA, Simple IRA, Single K
IRAs – Roth, Rollover, Traditional

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