



## INSURANCE SERVICES

Supporting you in creating solutions for your clients.

Whether your practice is focused on business owners, families of wealth or the intergenerational transfer of wealth, finding the right insurance products to meet the needs of your clients is essential and complicated. Multi-Financial's Insurance Services Department is here to help you develop effective and tax-efficient solutions. They are also on call to help you resolve any status or service issues you may have with any of the insurance companies. Our dedicated team of Insurance Specialists is available to assist you by preparing insurance proposals for client presentations and will work one-on-one with you to find the right solutions for your clients. You know your clients best, our goal is to support you.

### Pre-Sale Marketing

- Client-specific illustrations
- Case design and product selection
- Dedicated Web site for software tools and forms

### Dedicated Services

- Quick and easy appointment with carriers
- Maintenance of all paperwork
- Simple processing of appointment renewals
- Relationships with insurance companies
- Impaired risk evaluations
- Dedicated specialist assigned to each financial professional