



## Insurance Evaluation

No one wants to feel vulnerable, particularly when it comes to their financial future. You can gain confidence and comfort however, by developing a plan that protects the wealth you've accumulated and provides a guardrail as you pursue your financial goals. While there are many complexities when trying to address all of your insurance needs, we can help you receive wide-ranging protection against the unexpected and the inevitable through careful, strategic planning.

**We can make sure that your insurance solutions fit into your comprehensive wealth management plan by:**

- Analyzing your existing insurance plans to gauge whether they accurately reflect your current needs.
- Surveying the options among dozens of highly rated insurance carriers so you have an objective recommendation.
- Participating in regular review meetings to make sure your insurance continues to meet your evolving needs.
- Developing a plan so your family's lifestyle wouldn't be significantly affected if you were to lose your income.
- Performing evaluations for life insurance amounts needed and options available.
- Providing buy/sell and key person evaluations for business needs.
- Providing access to specialists in life insurance, long-term care insurance, disability insurance, estate planning, business planning, and home and auto insurance.



Copper Leaf Financial is not compensated for any insurance planning services. We work closely with trusted partners to help identify your insurance needs and walk you through the options to best meet your needs. They are national companies who work exclusively with fee-only planning firms like us to provide consistent, objective service from salaried experts who accept no commissions, referral fees or kickbacks. We work together to make sure you have the proper amount of protection and that the insurance you have reflects your specific goals and objectives identified in your wealth management plan.

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Call us today at (802) 878-2731 to schedule a strategy session and discuss your insurance options as a part of your overall financial plan.

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