



WHY USE US?

- 24-hour offers, with only an illustration and medical review
- Streamlined contracting
- Superior offers
- Unsurpassed customer service
- Policies of any size are welcomed, including cases ranging from \$50,000 to \$50 million

CONTACT US

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LIFE INSURANCE AUDIT AND VALUATION SERVICES

Life insurance is an important part of an overall financial plan. Regular reviews can determine whether the policy is performing according to expectations and meeting financial objectives.

There are many factors to consider that may impact the performance and suitability of a life insurance policy. It is important to periodically review your client's life insurance and determine that both the product and the planning objectives are being met. Some of the more common reasons to conduct regular life insurance policy reviews include:

- Policy funding adequacy
- Carrier rating
- Cost of insurance increases
- Policy maturity risks
- Replacement to better performing policy

Our mission is to help individuals better understand their financial options. We empower clients by providing the facts necessary to make the best decisions for their financial future — and life insurance is an important component of that.

More importantly, there is *never* a cost to you or your client. The Fair Market Value provides advisors with a life insurance appraisal when encountering situations like:

- Business valuations
- Transferring a policy from one entity to another
- Exiting from a split-dollar arrangement
- M&A or bankruptcy transactions
- Business disputes that involve a buy/sell agreement