ECON WEALTH MANAGEMENT

INSURANCE PLANNING SOLUTIONS GUIDE

A GUIDE OF MANAGING RISK FOR YOU AND YOUR LOVED ONES'

We offer a variety of Insurance Planning Solutions so you can have peace of mind knowing that your loved ones will be taken care of.

Core Areas

Insurance Policy Review

- Review policy beneficiaries
- Assess long-term affordability
- Provide ongoing reviews as needs evolve

Disability and Life Insurance

- Analyze your needs using our planning software
- Review and assess policy structures
- Analyze life insurance needs for income replacement purposes

Long-term Care

- Develop funding strategies to ease the financial burden
- Review existing long term policies
- Coordinate long-term care planning with other income strategies

Property and Casualty Review

- Identify any liability risks associated with your properties
- Coordinate with agents to align policy limits with overall risk tolerance
- Review coverage for adequate liability protection

Advanced Planning Services

Specific Tax and Estate Planning Strategies

For specific scenarios involving appreciated stock, our advisors work to minimize taxes and maximize gifts to beneficiares.

Liquidate and Leverage Strategies

We evaluate insurance solutions using tax deferred vehicles to minimize future taxes and provide more for beneficiaries.

Cash Flow Management Strategies

We coordinate with insurance personnel to use specific policies to meet cash needs in a tax efficient manner.