

PART I:

ESSENTIAL HOUSEHOLD SECURITY

Here is what to expect and how we will help protect your family.

WELCOME

You took the first step. Great job.

Thank you for filling out the survey. Your free strategy session is not a sales pitch. It is a real conversation built around you, your family, and what you need most.

As an independent agent, I work with many top insurance companies. That means I can shop around for you and find a plan that is a good fit. You are not stuck with just one option.



Health Insurance

Plans for you and your family to help pay for doctor visits, hospital stays, and medical costs.



Life Insurance

Protects your family if you pass away. Helps cover bills, debts, and everyday costs.



Disability Insurance

Pays you monthly if you get sick or hurt and cannot work. Keeps your bills paid.

Here is what will happen when we talk.

This call is free and there is no pressure to buy anything. Here is how it works:

1 We start with your biggest concern

Based on your survey answers, we will focus on what matters most to you right now. That could be health coverage, protecting your income, or taking care of your family.

2 We look at your full picture

We will talk about your current coverage (if you have any), your family, your health, and your budget. No judgment. Just a friendly chat.

3 I compare plans from multiple companies

Because I work with many carriers, I can compare options for you. I will show you real plans in plain language so you know exactly what you are getting.

4 You choose what works for you

If something fits, great. If not, you will leave knowing a lot more than when you started. No hard sell. Ever.

BEFORE YOUR SESSION

A few things to have ready.

Current insurance info

If you already have a plan, know the name of your insurance company and your plan type if you can.

Family details

Names and ages of the people you want to cover, including your spouse and any children.

Basic health info

No medical exam needed yet. Just know if you or your family have any major health conditions.

A rough monthly budget

Even a ballpark number helps. It lets me focus on plans you can actually afford.

Big names. Real options. Your choice.

As an independent agent, I have access to plans from many well-known insurance companies. Here are some you may already recognize:

- Mutual of Omaha
- Aetna
- UnitedHealthcare
- Humana
- Blue Cross Blue Shield
- Cigna
- Transamerica
- Lincoln Financial
- Kansas City Life
- Assurity Life
- Washington National
- Bestow (Term Life)

Not all companies are available in every state. We will cover what is available in your area during your session.

Your family deserves more than one option.

I will come prepared and ready to help. Just show up ready to talk about what matters most to you.