

The CARES Process™

As a trusted advisor your clients rely on your knowledge of their finances to help them meet their long term goals. However, in today's complicated annuity landscape it's becoming increasingly difficult to stay on top of an industry full of constantly changing products, and increasing regulations.

BE A PART OF THE SOLUTION

If you have concerns about your client's grasp of their annuity products, how its features meet their objectives, and whether there may be newer, better, more appropriate solutions, contact us. As specialists in Annuity Contracts, we help individuals, attorneys and advisors nationwide with these challenges.

Our approach is based on The Comprehensive Annuity Review and Evaluation Service™ — a professional process designed to educate contract holders on their products and features, employing analytical tools developed and managed by our nationally-recognized team of annuity experts.

TAKE THE NEXT STEPS

The CARES Process™ is a comprehensive review of the client's current contract.

- 1 It begins with a one page fact finding questionnaire to help the client identify the ultimate purpose for the asset.
- 2 We then analyze and detail the current product features in context with the designated goal. A best fit benchmark is selected.
- 3 The CARES Report™ educates the client on their selected objective and highlights features that have the largest impact on its achievement. By comparing the client's contract to a comparable benchmark product, available today, an advisor can help the client decide whether or not their policy is meeting their goals sufficiently.



Product Analysis

We understand annuities can be complex; the CARES Process™ helps you provide the clarity your clients desire.



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