MIDWEST FINANCIAL PARTNERS

Insurance Planning Services

Competitive and affordable life, disability, long-term care, and health insurance coverage

Our insurance planning services are provided by a group of financial professionals who are experienced in the insurance industry. Our financial professionals have extensive experience working with insurance companies and provide our clients with a wide choice of products and carriers. We have the resources of a large financial organization coupled with the kind of personal attention and service you would expect from a small company.

What Clients Can Expect From Us

With insurance coverage, it's essential to have a financial professional at your side who knows how to navigate through the process. You can expect us to use our resources and knowledge to provide you with the confidence that comes from having the right insurance protection for you, your family, and your business. You can also be assured that the insurance companies we represent must satisfy our due diligence process. We provide you with a single, streamlined procedure for applying to multiple carriers; information is efficiently collected once and shared with all carriers in our network.

Services & Benefits

We guide you every step of the way as we review, analyze, implement, and monitor your insurance needs.

Our insurance planning services include:

- Analysis of your need for insurance coverage, including type of insurance as well as amount and duration of coverage
- Assess any current medical conditions to determine impact on obtaining coverage and cost of coverage
- Determine appropriate carriers if special needs or medical conditions are involved
- Present you with all the options that are suitable for your particular situation
- Manage the underwriting process by working with the carriers' underwriters to secure and provide any additional information needed to make an offer
- Thoroughly review all the offers received and offer guidance and recommendations to select the most appropriate product and carrier
- Assist you with ownership and beneficiary designations, as well as premium payer issues, to properly coordinate with any estate planning needs
- Provide periodic reviews (at least annually) to ensure that your coverage satisfies your needs and that the carrier remains financially sound
- Work with the insurance company on your behalf to address any changes required to the coverage, to process claims, and to resolve any disputes if they arise

You Can Count On Us To:

- Help you protect your financial future and your health by selecting an appropriate insurance product or combination of products
- Maintain a high degree of communication and personal service
- Respond quickly to your requests
- Help you be proactive in keeping your insurance coverage up-to-date with changes in your life circumstances, business, regulations, and tax policy
- Respect your privacy. Above all, we value your trust and keep all information that we collect strictly confidential.

Value Added Advantages

We understand the insurance planning process and are thorough in our approach—we listen carefully because we know that attending to the details is the key to getting you the right coverage. Our group has logged over 100 years of combined experience in securing and administering insurance coverage. Just as importantly, we're driven by the insurance needs of our clients, not by the sale of the products.

Estate & Life Planning Strategies • Employee Benefits Planning • Wealth Management & Financial Strategies

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AXA FINANCIAL PROTECTION

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