

THE PROCESS:

- **Assessing Personal Goals and Concerns**
- **Financial Summary**
- **Medical Questionnaire**
- **Education > Questions > Tools**
- **Policy Structure & Selection > Benefits, Cost, Underwriting**
- **Tax Savings**
- **Completing the Application and Underwriting**
- **Ongoing Education (Newsletter), Resources**

Throughout the Process, I will answer questions, provide questions and I will educate you - so you can make the best possible decisions.
