

# Insurance consultation

- When most people think of insurance, they think of life, home and auto insurance.
- But insurance-based strategies can also help you protect and enhance your wealth.
- Our Regional Insurance Specialist can meet with you to determine the suitability and cost-effectiveness of several insurance strategies to:
  - Boost your retirement income
  - Enhance the value of your estate for your beneficiaries
  - Protect your assets from the impact of probate taxes
  - Maximize your gift to charity



Wealth management services

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