ADVISORNET INSURANCE

Insurance Concierge Service

About

Regulatory requirements, client best interest duties, product depth and complexity all put additional demands on most advisors. Consequently, more advisors are looking to partner with risk management professionals to outsource their client's insurance needs.

The AdvisorNet Insurance Concierge program was designed specifically to fill this need.

The AdvisorNet Concierge Team

The Concierge team is headed by Fred Sherman, CLU, ChFC, CLTC. A 30-year veteran of the financial services business Fred has deep experience working with advisors and clients, helping solve financial needs such as living too long, dying too early, becoming disabled prior to retirement, and needing extended health care.

The team also consists of a very experienced staff of case managers assisting in the processing of new business, pre-underwriting, and in-force policy service.

What We Do

The Concierge team acts as a partner with your advisor, working directly with you to assist in case development, risk assessment, product selection, and the presentation of potential solutions to you. From there, we take the application and follow it through the underwriting process to policy delivery, all the while keeping you and your advisor informed along the way.

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AdvisorNetInsurance.com 612-347-8600

110 Cheshire Lane, Suite 200 | Minnetonka, MN 55305

Areas of Focus

Our services range from handling a simple term insurance need, to premium financing, to funding the liquidity needs of high-net-worth individuals and families. No need is too small or too large. The following is a non-exhaustive list of financial needs we have experience in.

Individual Needs

- Fixed and variable life insurance
- Disability Income
- Long-Term care
- Fixed and variable annuities
- Creating tax free income at retirement

Business Insurance Needs

- Business continuation planning
- Key person insurance
- Executive benefit planning
- Business valuations

Estate Planning

- Estate transfer cost
- calculations
- Methods to create estate liquidity
- Estate equalization concepts
- Managing life insurance as an asset class

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