



WEALTH MANAGEMENT



Complimentary Insurance Review

The word **“Insurance”** doesn’t evoke excitement, and it certainly isn’t something discussed at dinner parties. But insurance is a necessity in life.

*When was the last time you reviewed your property and casualty policies?
Do you know if you have adequate coverage that would thoroughly cover your costs in the event of an accident or claim?*

RFA is offering a complimentary insurance analysis, during which we’ll review:

- Home Owners Policy
- Auto Policy
- Umbrella Policy

Our independent analysis will provide:

- A summary of your current auto, home, and liability policies
- An understanding of how your current coverage works
- Identification of any potential gaps in your coverage
- Strategies to reduce your premiums without sacrificing appropriate protection

A few comments from clients who went through the insurance review process:

“I didn’t know I needed this until I did it!”

“It is great to have somebody look at my insurance coverage objectively, and not someone just selling me something.”

The review is complimentary and does not contain a sales pitch! **RFA does not sell insurance!** We are simply reviewing your coverage from a risk management standpoint to ensure that you are insured properly in the event of a claim. The insurance analysis is one of the many benefits you receive as a client of RFA, and is provided at no additional charge to you. Contact your Senior Wealth Advisor today to take advantage of this critical analysis!