



Advisory Services

Building Relationships Beyond Insurance

We take great pride in providing fantastic service and developing long-term, sustainable relationships. So when we established Advisory Services, our goal was to create a comprehensive experience from start to finish. We've taken what has historically been a transactional process focused on insurance sales and built a model based on deep, enriching relationships at every step of the journey.

We spoke with Jessica about her recent experience with Advisory Services:

A Meyer and Associates life insurance offer from the Brown University Alumni Association resonated with Jessica and James, new parents who were enjoying an elevated level of career success. Yes, they had some life insurance, but the Brown offer made Jessica realize they clearly needed more. So focused on their careers, they hadn't had much time to think about their changing needs.

When Jessica called Meyer and Associates to inquire about more coverage than the standard maximum offered through our traditional program, we immediately connected her with Bob, our life insurance specialist. **Explained Bob, "the moment I met Jess, I knew that she and James, an ad agency owner and investment banker, needed more than insurance policies; they needed true estate planning."**

Says Jessica, "Bob was fantastic, and we can't say enough positive things about him. We trusted him right off the bat. He was patient and he explained the process." After reviewing their finances, Bob recommended the right amount of term life insurance for each of them should the unforeseen happen, plus survivorship life insurance to address federal estate tax issues.

Not only are Jessica and James both covered and their young family now protected, but they're also both more acutely aware of their financial needs and continue to plan for their future.

According to Bob, "with respect to estate planning, I'm always concerned about two things – privacy and minimizing taxes. I'm continuing to work with Jessica, James, and their law firm on more comprehensive estate planning."

Successful professionals like Jessica and James often lead extraordinarily hectic lives. But having appropriate financial protection is one of the most critical decisions they'll make. Bob and our other Advisors are here to help. They will get to know you, assess your financial situation, and inquire about your future plans and goals so they can help you select insurance and financial solutions to fit your needs. Their services are complimentary and the relationship is ongoing, so you'll always have somewhere to turn should your situation and needs change.

For more information or to speak with an Advisor, call 877.878.2467, or email Info@MeyerAndAssoc.com.

"As Brown Masters alumni, several positive life events, including the birth of our daughter and elevated career success, led us to respond to the life insurance offer from Meyer and Associates and their affiliation with Brown.

Our professional success had reached the level where we needed a high level of customer service and insurance options. Bob was fantastic, we can't say enough positive things about him. We trusted him right off the bat. He was patient, he explained the process, and he and stuck with it for over a year. Bob has provided first-rate service, helped us procure the right stage of life insurance for our family, and we're continuing to work with him on the whole estate planning package."

*- Jessica,
Advisory Services Customer
from the Brown University
Alumni Association*

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