Integrated Insurance Consulting, LLC

2019 Webinar Series

Assist – Consult – Partner

At IIC, we believe in the power of education. Below is a listing of our 2019 CFP® CE webinar series. Each course is 1 hour long. If you are unable to attend a specific webinar of interest and would like a replay or corresponding resource kit email sarah@intinsconsulting.com.

We are also available to present, on-site or remotely, to your team, office staff, study groups or associations.

Term Insurance: Details That Matter

February 27, 2019 - 10:00am CT

REGISTER HERE

Many people make the mistake of purchasing term insurance based solely on the lowest price. Not all term insurance is the same. Just as with other purchases it may benefit your clients to pay a little more for a quality product. We examine product features and details that can impact the flexibility and future options available when designing term insurance protection. We discuss unique benefits and design options as well as the best way to shop for term insurance.

Attendees will receive greater insight on the term selection process and Key Questions™ and Tools to help serve your client protection needs.

Alternative Solutions to LTCi:

Protecting Your Clients' Wealth From LTC Expenses

April 24, 2019 – 10:00am CT

REGISTER HERE

A leading disruption to a smooth retirement is the need for long-term care (LTC). The risks and consequences of a LTC event are significant. Many advisors and their clients are concerned about traditional LTC insurance historical and unpredictable price increases, along with the possibility that premiums will be paid without the need for care. Fortunately, there are new ways to insure for care. This presentation will define LTC and provide positioning for a comfortable client conversation. We examine modern insurance options, differentiating them with traditional LTC insurance. We'll arm you with critical client questions to help determine which options make sense to explore.

Attendees will receive our LTC Hybrid Kit with advisor and consumer friendly educational tools, as well as a LTC Pricing comparison for the options discussed.

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Rethinking Retirement Income: Thinking Strategically About Annuities

June 26, 2019 – 10:00am CT

REGISTER HERE

The #1 fear for many is running out of money. Retirement planning is increasingly complicated, and the conventional wisdom makes creating retirement income harder to deliver in today's environment. We explore Real Life Case Stories of when and how an annuity provided a good fit solution to common income challenges. We also discuss the current retirement landscape, and review popular annuity options, including immediate annuities, longevity annuities and income riders.

Attendees will receive our Annuity Selection Questionnaire and Roadmap tools to easily determine if, and which type of, an annuity should be considered for income planning.

Disability Insights

August 28, 2019 – 10:00am CT

REGISTER HERE

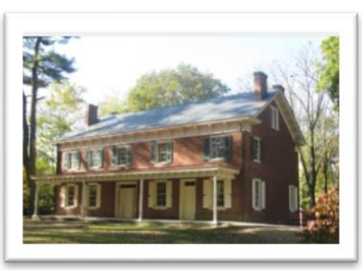
Disability insurance is often overlooked or misunderstood. **For many of us our #1 asset is our ability to work and earn an income, yet too many are grossly under or uninsured.** We address common misperceptions and claim statistics surrounding disability insurance. We dig into the details of designing a disability policy to include some of the unique riders and features used in creating a more comprehensive plan. We discuss the weakness of many group plans and share key questions to help you discuss disability insurance with your clients. We also review disability options for business owners, to help you protect their business and their family.

Attendees will receive a copy of our Disability Resource Kit which includes our Integrated Insights™ on Disability Review as well as our DI Prescreen and Design Questionnaire.

Estate Planning Uses of Life Insurance

October 30, 2019 – 10:00am CT

REGISTER HERE



Few clients have exposure to estate taxes with today's high federal estate tax laws, but estate planning isn't just about tax planning. Life insurance is valuable, even when there's no tax to pay. We examine several financial applications for life insurance and discuss where it makes sense. We discuss how the economics of life insurance can best achieve an estate planning goal. Through a series of eight client case studies, we illustrate how using life insurance can create positive outcomes for a range of situations.

Attendees will receive our Estate Planning Uses of Life Insurance Kit which includes our Integrated Insights™ on the Economics of Life Insurance and Stretch IRA alternative, as well as an article on why your life insurance doesn't have to retire when you do.

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