**Why Clients and Producers Choose Secor Advisors:**

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| **Independence** | * **Operate as an independent sales organization not tied to any carrier.**
* **Represent the top 30 carriers in the North America**
* **Take pride in finding the best solution for the client**
 |
| **Knowledge** | * **Holding advanced certifications including CFA and CLU professional designations**
* **Have detailed knowledge on the major carriers and their products**
 |
| **Integrity** | * **We offer the highest level of professionalism**
* **Offer advanced third party technology that allows clients to validate recommendations**
 |
| **Professionalism** | * **We conduct ourselves in a professional manner based on objective facts.**
 |
| **Accessibility** | * **Clients can assess us through their financial professional**
 |
| **Transparency**  | * **Full disclosure to client. Comparison of underwriting options**
 |
| **Full range of financial services** | * **Financial planning - estate planning – business continuity planning - retirement planning - education planning - long-term care - life insurance – alternative assets including annuities- trust-related services**
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**Our Financial Professional Consulting services are designed to fill the gaps, with a suite of capabilities to support your business practice across the complete financial service lifecycle. We offer complementary expertise, point of sale support, superior case management, as well as access to new revenue opportunities, and through our support services, staff augmentation. By taking advantage of our extensive case management background and superior sales support, we can eliminate your constraints in bringing in new business opportunities and incremental income.**

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| **Advanced Client Advisor Services**  | * **Operate as an independent sales organization not tied to any carriers.**
* **Represent the top 30 carriers in the North America**
* **Take pride in finding the best solution for the client**
 |
| **Biometric Longevity Planning Analysis** | * **Holding advanced certifications including CFA, and CLU professional designations**
* **Have detailed knowledge on the major carriers and their products**
 |
| **Advanced Underwriting** | * **We offer the highest level of professionalism**
* **Offer advanced third party technology that allows clients to validate recommendations**
 |
| **Sophisticated Modeling** | * **We conduct ourselves in a professional manner based on objective facts.**
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|  **Client First Comprehensive Solutions**  | * **Multi-carrier comparison shopping**
 |
| **Policy Review**  | * **Full disclosure to client. Comparison of underwriting options**
 |
|  **Client/Family Business Evaluation** | * **Financial Planning - Estate Planning – Business Continuity Planning - Retirement Planning - Education Planning - Long-Term Care - Life Insurance – Alternative Assets including Annuities- Trust-Related Services**
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| **Expert Case Management** | * **Employ comprehensive case management system**
 |
| **Advanced Markets** | * **Trusts structure**
* **Premium Finance**
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| **Wellness Program** | * **Provide a better understanding of client’s medical condition and awareness of how to extract the best care of their healthcare provider**
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