



The Company You Keep®

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The Company You Keep®

1. PERSONAL INSURANCE PLANNING

- LIFE INSURANCE
- INDIVIDUAL HEALTH INSURANCE**
- LONG-TERM CARE INSURANCE
- WEALTH TRANSFER PLANNING
- ESTATE CONSERVATION
- INDIVIDUAL DISABILITY INCOME INSURANCE**
- EDUCATION FUNDING / 529 COLLEGE SAVINGS PLANS*

2. BUSINESS & PERSONAL QUALIFIED RETIREMENT PLANS

- IRAs and IRA ROLLOVERS
- ROTH IRAs
- SEPs
- KEOGHs
- 401(k)s
- PENSIONS
- 412i
- COLI / BOLI

3. FINANCIAL PRODUCTS

- MUTUAL FUNDS*
- VARIABLE ANNUITIES*

4. BUSINESS INSURANCE PLANNING TO FUND

- BUY-SELL AGREEMENTS
- KEY PERSON PROTECTION
- EXECUTIVE BONUS PLANS
- SALARY CONTINUATION PROGRAM
- BUSINESS OVERHEAD EXPENSE**
- DISABILITY BUY OUT**

5. EMPLOYEE BENEFITS

- GROUP HEALTH INSURANCE**
- GROUP DISABILITY INCOME INSURANCE**
- VOLUNTARY PAYROLL DEDUCTION PROGRAMS TO SUPPLEMENT EMPLOYEE BENEFITS

>>All BPA members will receive financial consultations to address any questions about investments, insurance, retirement planning, or any of the above topics. These services are provided free of charge with a membership to the BPA<<<

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