



EQUIS
FINANCIAL



We are a dedicated team of *local* professional agents who work in our community to protect what matters most...

The mortgage is the vehicle to protect our families

Equis Mortgage Protection agents are not *captive agents*, we represent multiple carriers and products so our loyalty is to **YOU** the client

Equis Financial is 100% Client Focused!

Our Companies

Services We Offer

LIFE INSURANCE
TERM LIFE
WHOLE LIFE
UNIVERSAL LIFE
MORTGAGE PROTECTION
FINAL EXPENSE
CHILDRENS WHOLE LIFE
RETIREMENT & SAVINGS
FIXED INDEXED ANNUITIES
401K ROLLOVER
COLLEGE SAVINGS PLANS
WEALTH TRANSFER
KEY PERSON INSURANCE FOR
YOUR BUSINESS

In person visit helps to ensure NON-MEDICAL

Simplifies & expedites the underwriting process

American-Amicable



Gerber Life Insurance Company



INSURING LIVES • SUPPORTING WOMEN • SERVING COMMUNITIES™



Foresters
Financial



The reason for the In-Person visit and my JOB!

- All of the M.P. programs are State regulated
- The Carriers make the process simple, practical, and affordable for your family
- 2 Facets to this: Eligibility & Suitability
- All of the programs are simplified issue, **NO MEDICAL EXAMS!** (*Protects your Insurability*)
- It simplifies and expedites the Underwriting process.

What you can expect from me!

- We comprise an individual profile based on YOU and your specific situation (Underwriting Q.)
- We match the profile to the program(s) that fit best for you and your family.
- This way we ensure you are not *over covered* and surely not *under covered*. (SUITABILITY)
- When a carrier receives an application all they do is make sure that the information we gathered matches the M.I.B.
- Work hard to get you approved!



What is Mortgage Protection?

- Can pay your mortgage off when you die
- Eliminates ANY burden on family members (Surviving spouse, siblings, children, etc.)
- It protects the Loan, the Equity, and bridges the gap
- You choose Beneficiary & Level Death Benefit/Level Premium
- Covers death due to illness or accident
- Provides “Mortgage Payment” Protection
- Eliminate other unsecured debt/monthly obligations