



PROVIDING PERSONAL AND BUSINESS INSURANCE AND WEALTH MANAGEMENT SUPPORT FOR A MEDICAL PROFESSIONAL

An Alera Group company (GCG Financial) was working with a medical professional, whose business had undergone some recent transitions. The client's initial conversations were with Rizwan Syed for medical malpractice protection. Following that, Rizwan introduced the client to Brian Carlson, to help him comprehensively analyze his personal and professional needs.

Process

Given that every client has a unique situation, what works for one requires a different approach for another. Brian worked with the client to assess his needs prior to giving any specific recommendations. The client wasn't sure what he was seeking specifically, but he was open to recommendations for both his personal and business situations. He collected and shared a range of documentation with Brian, who analyzed it to identify the client's needs, ultimately recommending personal life insurance protection, personal disability protection, a college fund for his children and business disability protection to address his immediate, high-priority needs.

Challenges

This client was particularly busy with his business and managing the changes taking place. As a result, the timing was a challenge. Brian continued to check in and follow up with him on a regular basis so that he could get started with the process when he was ready and available.

Results

Thanks to Brian's patience, persistence and comprehensive support, the client has:

- Peace of mind, ensuring that his family and his business will be taken care of if a catastrophic event should take place
- A trusted team to help him with personal and business needs
- A current disability and life insurance premium of roughly \$25,000

The client continues to work with Brian and Rizwan and is in the process of implementing a 401k for his business.

About Alera Group

Based in Deerfield, IL, Alera Group's over 1,000 employees serve thousands of clients nationally in employee benefits, property and casualty, risk management and wealth management. Alera Group is the 15th largest independent insurance agency in the country. For more information, visit www.aleragroup.com or follow Alera Group on Twitter: @AleraGroupUS.

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3 Parkway North | Suite 500 | Deerfield, IL 60015

aleragroup.com

(847) 582-4501