



**Robin Harris, CLTC**  
**Health and Life Insurance Broker**  
**Certified in Long Term Care**

**CIRCLE ALL TOPICS THAT YOU WOULD LIKE TO DISCUSS**  
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*You will be contacted to set up an appointment with Robin.  
 We look forward to working with YOU!*

<ul style="list-style-type: none"> <li>○ ANNUITIES           <ul style="list-style-type: none"> <li>• Fixed Annuities</li> <li>• Can earmark for Long Term Care</li> <li>• Safe Money Alternatives (Upside, Potential w/o the Downside Risk)</li> </ul> </li> <li>○ BUSINESS OWNERS           <ul style="list-style-type: none"> <li>• Buy Sell Agreement Funding</li> <li>• Business Succession Funding</li> <li>• Key Employee Coverage</li> </ul> </li> <li>○ CANCER, CRITICAL ILLNESS and ACCIDENT           <ul style="list-style-type: none"> <li>• Extended Cancer Coverage</li> <li>• Heart Attack, Stroke, Kidney Failure</li> <li>• Accidental Injury and Dismemberment</li> </ul> </li> <li>○ DENTAL, VISION           <ul style="list-style-type: none"> <li>• Can be Individual or Combined Together</li> <li>• Can include hearing with hearing aids</li> </ul> </li> <li>○ DISABILITY           <ul style="list-style-type: none"> <li>• Individual</li> <li>• Key Employee</li> <li>• Medical Professionals</li> <li>• Travel Doctors and Nurses</li> </ul> </li> <li>○ EMPLOYEE BENEFITS           <ul style="list-style-type: none"> <li>• Medical, Dental, Vision</li> <li>• Life, Accident, Gap, Cancer</li> <li>• Short- &amp; Long-Term Disability</li> </ul> </li> <li>○ FUNERAL &amp; BURIAL           <ul style="list-style-type: none"> <li>• Final Expense Insurance</li> <li>• Funeral Expense Trust</li> </ul> </li> <li>○ Global Medical           <ul style="list-style-type: none"> <li>• Travel Medical</li> <li>• Trip Protection</li> <li>• Expat Medical Insurance</li> <li>• Executive Travel Protection</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ HEALTH INSURANCE           <ul style="list-style-type: none"> <li>• On/Off Exchange</li> <li>• Short Term Medical</li> <li>• Hospital Indemnity</li> </ul> </li> <li>○ LONG TERM CARE           <ul style="list-style-type: none"> <li>• Traditional Long-Term Care</li> <li>• Hybrid Long Term Care with Life Insurance or Annuity</li> <li>• Extended Care, Home Healthcare</li> <li>• Assisted Living, Nursing Home</li> <li>• Short Term Care Alternative</li> <li>• Medicaid Compliant Annuities</li> </ul> </li> <li>○ LIFE INSURANCE           <ul style="list-style-type: none"> <li>• Term Life (1, 5, 10, 15, 20, 25, 30)</li> <li>• Universal Life (UL, GUL, IUL)</li> <li>• Whole Life</li> <li>• BOWL – Bank On Whole Life</li> <li>• Living Benefits– Critical, Chronic and Terminal Illness</li> <li>• Accidental Death</li> </ul> </li> <li>○ MEDICARE ADVANTAGE PLANS           <ul style="list-style-type: none"> <li>• Most Plans are Zero Premium</li> <li>• Extra Benefits (Dental, Vision, Hearing, OTC, Gym)</li> <li>• Network Based HMO, PPO, POS</li> <li>• Plans Vary Based on County</li> <li>• Most Include Part D Drug Plan</li> <li>• Veterans Plan Available</li> </ul> </li> <li>○ MEDICARE SUPPLEMENTS           <ul style="list-style-type: none"> <li>• Plan F, G, N, Innovative, High Deductible</li> <li>• NO Network Restrictions</li> <li>• Original Medicare</li> <li>• Extended Preventive Benefits</li> <li>• Fitness Benefits</li> </ul> </li> <li>○ Part D Prescription Drug Plans           <ul style="list-style-type: none"> <li>• Plans Vary Based on County and Prescriptions</li> </ul> </li> </ul>
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NAME \_\_\_\_\_ ZIP CODE \_\_\_\_\_

PHONE \_\_\_\_\_ EMAIL \_\_\_\_\_

COMMENTS \_\_\_\_\_