

INSURANCE PLANNING SERVICES



WHY INSURANCE MATTERS

At Jumet Financial, insurance is about helping to protect your financial plan — not selling products. We recommend life insurance only when it's truly needed, based on your unique circumstances and goals. Our advice reflects our commitment to independence, ensuring recommendations are made solely in your best interest.

OUR APPROACH

- We are an independent financial firm dedicated to our clients, meaning we are not required to meet sales quotas or push specific products.
- Before recommending life insurance, we consider your personal circumstances, coverage, and cost.

WE CONSIDER LIFE INSURANCE WHEN CLIENTS HAVE...

- Dependents relying on their income
- A new mortgage or growing family
- Estate planning needs
- Business or legacy considerations

OUR PROCESS

- Review existing policies – Is your existing coverage adequate?
- Evaluate Needs – Based on your income, debts, and goals.
- Shop for Value – We compare policies to find the best pricing and coverage.
- Review Over Time – Insurance needs change, so we revisit coverage as life evolves.

**AT JUMET FINANCIAL, LIFE INSURANCE IS USED
THOUGHTFULLY — AS A TOOL TO HELP PROTECT
YOUR FUTURE. WE FOCUS ON A SIMPLE, AFFORDABLE,
AND PERSONALIZED APPROACH THAT PUTS YOUR
NEEDS FIRST.**

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