

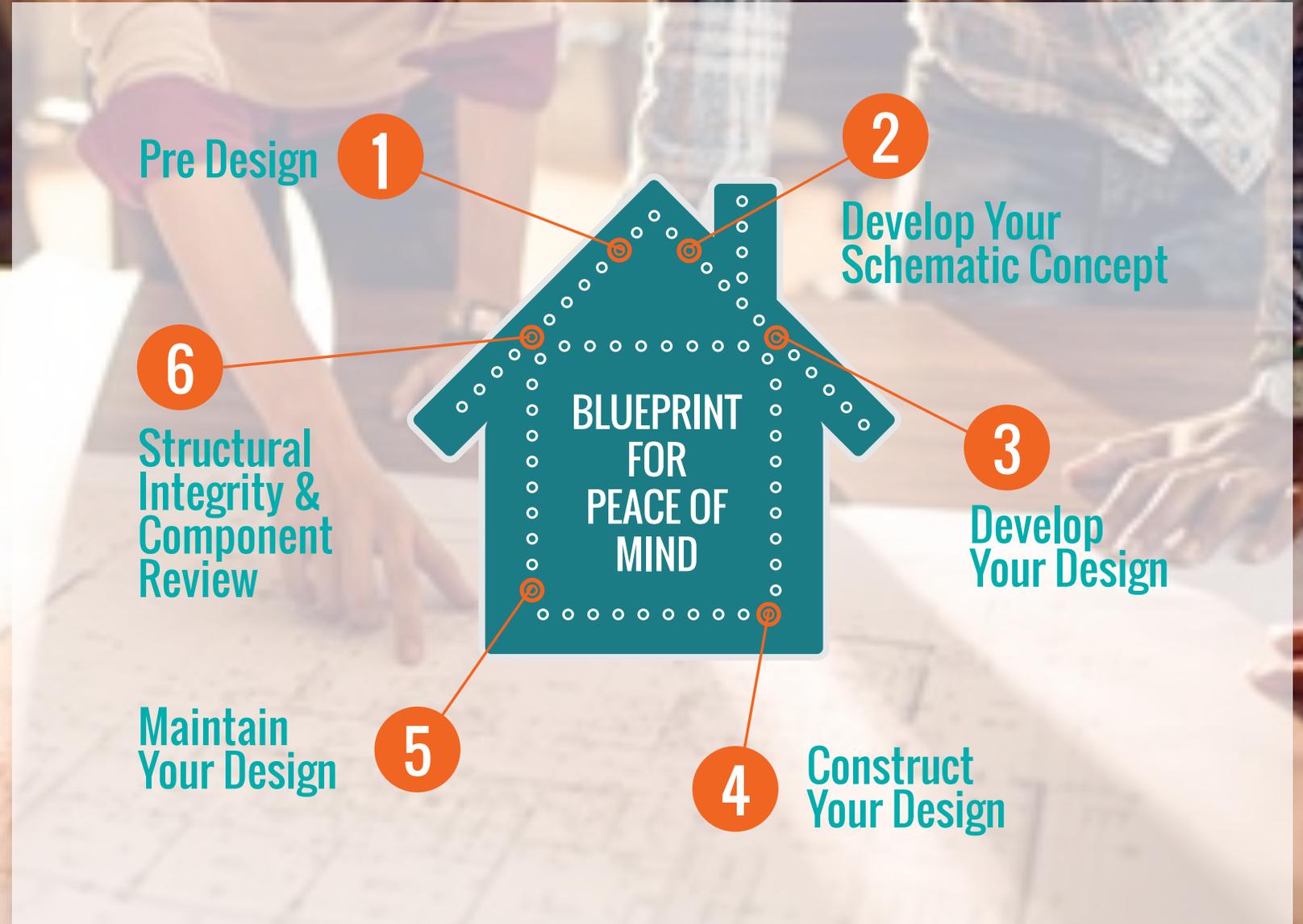
A close-up photograph of a person's hand pointing at architectural blueprints on a desk. Another hand is holding a pen over the blueprints. A laptop is visible in the background, and the scene is lit with warm, golden light.

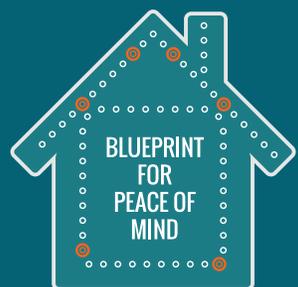
INFORMED
Insurance Brokers

Blueprint for Your Peace of Mind

Our Process for Ensuring Your
Insurance is Right for You

The Process

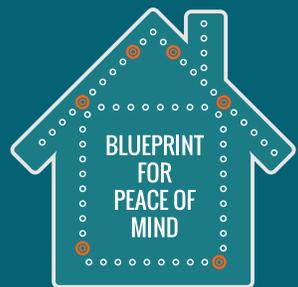




The Process

1. Pre-Design

When you contact Douglas and his team, we will start the process of assessing how we can best assist your family and/or business. We are already thinking about how to help you become an Informed Insurance consumer.

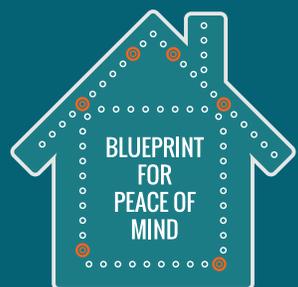


The Process

2. Develop Your Schematic Concept

We take time to learn about you, your family, and your business.

During this stage, we commit to ensuring that your conversation with Douglas brings value to you. We do this by asking questions and gathering the details needed to ensure you are properly protected with the right solution.

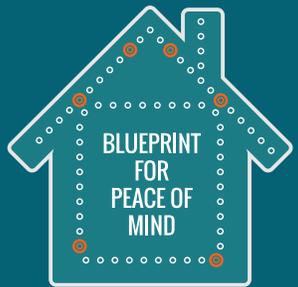


The Process

3. Develop Your Design

During this stage, Douglas commits to researching options for you.

He and his team will invest time “behind the scenes” to find the best options for you.

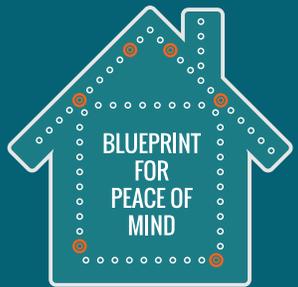


The Process

4. Construct Your Design

Douglas and his team works with insurance carriers to ensure that your coverage is executed appropriately.

When we are satisfied that everything is in order, you will receive your new client welcome package.



The Process

5. Maintain Your Design

As an Informed Insurance client, you'll receive regular contact from us through our educational client newsletter.

We are here to guide you and answer your questions.

If you ever find we let you down, we commit to doing everything in our power to making things right.



The Process

6. Structural Integrity & Component Review

Life changes. Whether you have a child, start your own firm, retire, acquire new assets, etc., you will find that we are committed to checking in with you at least once a year to ensure that you continue to receive the best value and are protected from any gaps in your insurance.

Your Outcome

Confidence

Relationship

Knowledge

Collaboration

