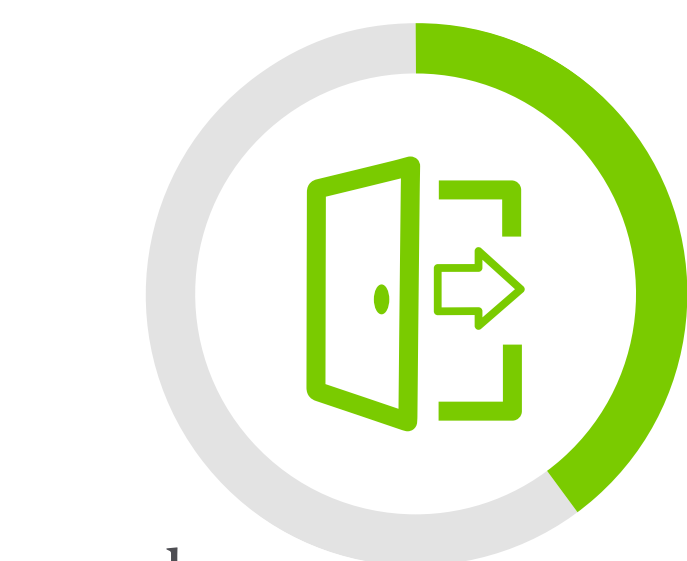


Financial Advisors Lacking Holistic Approach Risk Losing Clients

Clients expect advisors to account for all facets of financial planning, including insurance coverage

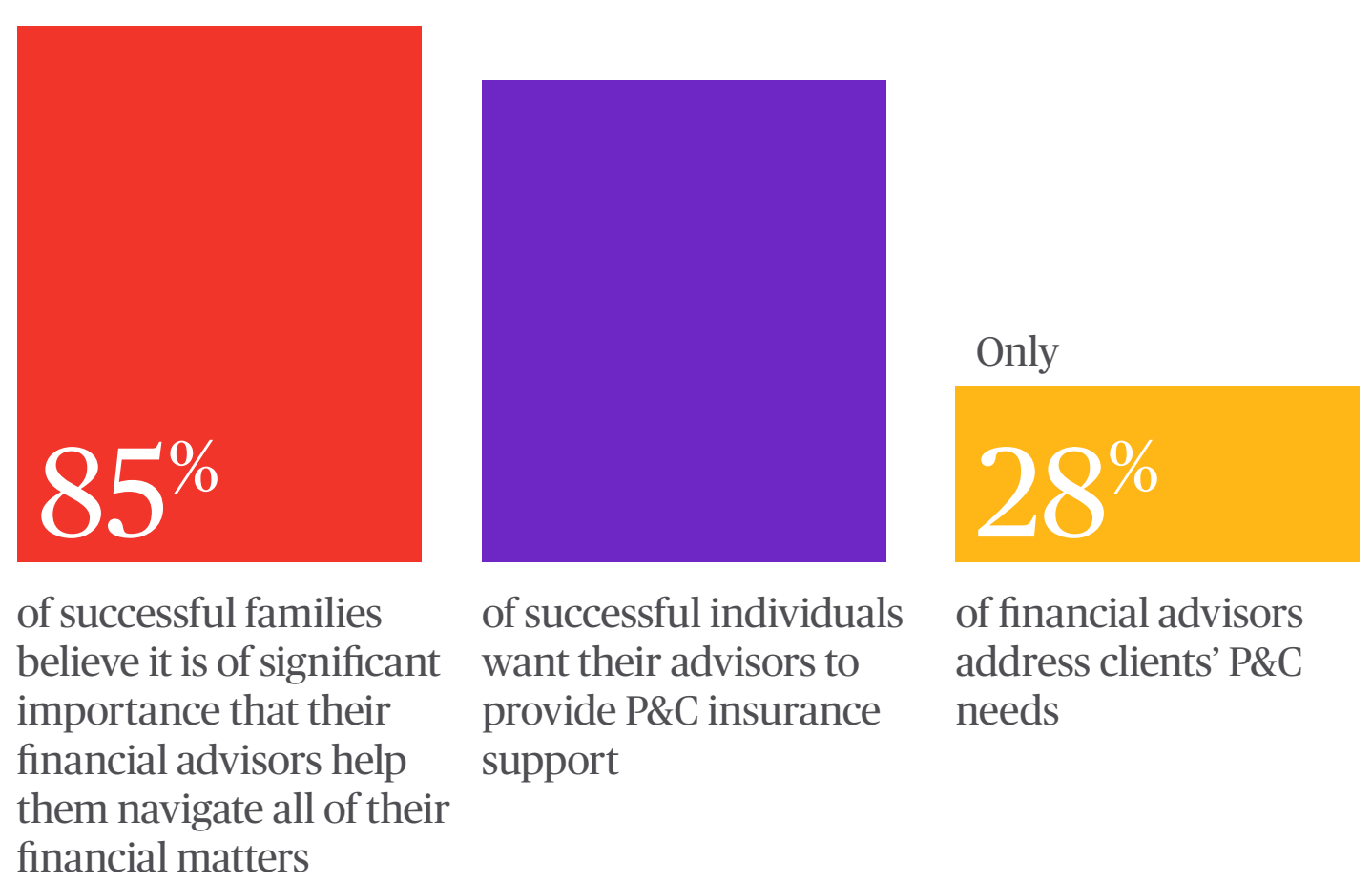


The Growth Opportunity



nearly **40%** of successful individuals would **consider switching to an advisor** who provided P&C support

Clients are expecting more from their advisors, but those needs are not being met:



Reap The Benefits

Taking a holistic approach will achieve the following:



Three Roadblocks to Covering All Financial Bases

Clients lack entire insurance products or key coverages within existing products



74% have liability insurance, but many **don't have high enough limits**

Clients think one-size-insurance-fits-all



87% use a **standard carrier** to protect against their unique risk exposures

Many don't get the right advice from advisors



28% did **not know where** to buy insurance

How to Get Ahead

Better protect your clients' total wealth by:

Researching and familiarizing yourself with common ways insurance may be inadequate for clients

Understanding the players in the P&C space

Making risk management a focal point of annual planning meetings

Seeking out and partnering with a broad variety of P&C contacts and evaluating which would best serve your clients

Regularly evaluating whether your clients financial picture has changed or evolved

To learn more, visit www.chubb.com/financialadvisor