

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



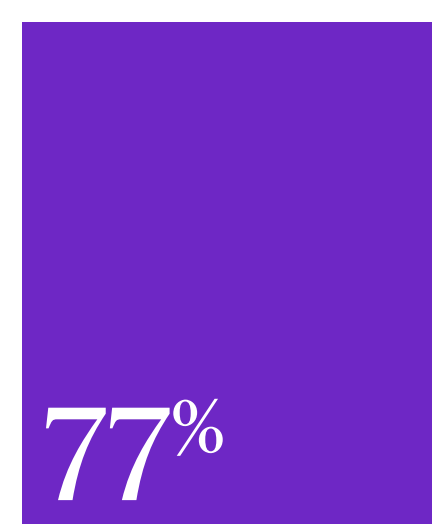
nearly **40%**

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

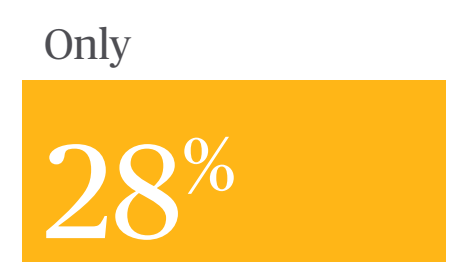
Clients are expecting more from their advisors, but those needs are not being met:



of successful families believe it is of significant importance that their financial advisors help them navigate all of their financial matters



of successful individuals want their advisors to provide P&C insurance support



of financial advisors address clients' P&C needs

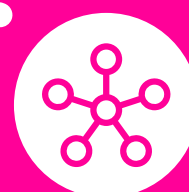
Reap The Benefits

Taking a holistic approach will achieve the following:

Safeguard assets to drive better returns



Access new networks of clients



Deepen client relationships



Better differentiate their value proposition



Three Roadblocks to Covering All Financial Bases

Clients lack entire insurance products or key coverages within existing products



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

Clients think one-size-insurance-fits-all



use a standard carrier to protect against their unique risk exposures

Many don't get the right advice from advisors



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



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



Understanding the players in the P&C space



Regularly evaluating whether your clients financial picture has changed or evolved



Making risk management a focal point of annual planning meetings

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