



PERSONAL INSURANCE WELLNESS CHECK

What can you expect during a wellness check?

A Vizance Advisor will review the following 10 items to ensure peace of mind:

1. Coverage limits.

Your current coverage limits may not be enough, so we'll review the limits on your policies.

2. Applicable discounts.

Life events that may not seem relevant to your policy may actually save you money.

3. New risks.

You might have a new risk (i.e. hobby) that isn't currently covered.

4. Changes to policy wording, exclusions, or conditions.

Any new policy exclusions or conditions that may change the insuring agreement outline.

5. Adequacy of your deductibles.

Let's discuss whether you are still retaining the right amount of risk for your appetite.

6. Changes to your life that require new coverage.

If there has been a major change in your life, such as getting married, or having children, we'll need to cover that.

7. Risk mitigation efforts that may reduce your premiums.

Installing safety features usually results in a premium reduction.

8. Loss history.

We'll briefly review any claims that happened during the year.

9. Protection for any new assets.

If you purchased significant assets over the last year, you might consider adding new coverage.

10. Supplemental coverages.

Consider adding to your current portfolio to protect all aspects of your life.

UNIQUE BENEFITS OF BEING A VIZANCE CLIENT

- Personalized recommendations that reduce loss exposure
- Proactive claim consultation
- Assistance in expediting claim resolution
- Answers to your insurance questions using understandable terms
- Association discounts
- A high standard of excellence and client focus
- Variety of insurance products to meet your unique needs
- Dedicated Advisor working with an amazing support team

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