WMS ADVISORS, LLC INSURANCE RESOURCE

Services Provided: Individual Life Insurance, Disability, Long-Term Care, and Annuities

HOW DO WE WORK TOGETHER?

1. Advisor contacts The Cason Group (TCG) with the client's information and what options the advisor would like to review.
    - When applicable, TCG may gather field underwriting information at this stage.
2. TCG reviews client's information with carriers and puts together several solutions.
3. TCG discusses options, with advisor, to ensure they align with the purpose of the policy.
4. Advisor agrees to the solution and gives the "green light" to move forward with implementation.
5. Advisor introduces the client to TCG, via email.
6. TCG handles the process from start to finish
    - Application
    - Underwriting
    - Policy Placement: TCG will connect with advisor on the cost of coverage before placing in force.
    - Policy Service (Including Annual Review)

DEDICATED CONTACT

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EXECUTIVE CONTACTS

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ABOUT US

The Cason Group operates as an independent insurance brokerage, representing the entire marketplace rather than a single carrier. Our goal is to deliver the most suitable and cost-efficient solutions for clients through an unbiased, consultative approach that complements your fiduciary standard.

We do not compete with RIAs, as we do not manage assets. Our focus is exclusively on implementing life insurance, disability, long-term care, and annuity solutions. Additionally, our team provides policy reviews and educational support to ensure clarity and confidence in every recommendation.

Importantly, The Cason Group does not contact clients directly. We work solely on behalf of advisors and place coverage based on the amount the advisor has determined to meet the client's needs—nothing more.