

Advanced Planning & Underwriting Specialists

A nationally renowned life insurance brokerage general agency specializing in Advanced Planning Insurance Solutions & Underwriting Advocacy for independent financial professionals and their clients.

Our mission is to deliver bespoke strategies to address mortality, morbidity, longevity, and tax risk for business owners, high-income professionals & retirees.

Expertise in the Mass Affluent Marketplace

- Policy reviews to ensure performance & potentially enhance benefits
- Term & permanent life insurance for protection & wealth maximization
- Long-term care insurance & annuity solutions to offset expenses for extended care events
- Disability Insurance solutions for income protection

Industry-Leading Underwriting

- High-Touch Underwriting with in-house Physician Assistant
- Access to 40+ top-rated carriers
- Competitive and customized offers

Comprehensive Underwriting Services

- Case consultation and client exam prep
- Informal applications and APS retrieval
- Custom cover letters and exclusive underwriting "Hot Line" access

Insurance-Based Solutions



For Businesses & Business Owners

Buy-sell planning, key person protection, executive benefits, and succession strategies



For High-Income Professionals

Income replacement, long-term care, wealth accumulation, and estate planning



For HNW & UHNW Retirees

Tax-efficient estate transfer, LTC planning, charitable strategies, and guaranteed income solutions

AgencyONE delivers objective, insurance-based strategies aligned with your clients' wealth creation and succession goals.



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