Wheatland Advisors

INSURE YOUR LOVE

Two Important Things to Know

About Life Insurance!

#InsureYourLove

Life insurance is an essential part of protecting your family and loved ones financially if your income source were no longer there. It can be beneficial for business succession planning or to pass on your legacy or estate. There are two questions that we are asked frequently when it comes to life insurance.

The first question is how much life insurance do I need? We believe it is essential to answer this question as precisely as possible. We provide an online needs analysis tool so you can determine how much insurance you should purchase based upon your current needs. This tool considers how much income your family will need, the number of children you would like to provide college for, and if you have debts to pay off. Once we know how much your family will need and for what purpose, we will go to work to find the best solution to fit your budget.

The second question is when should I get life insurance? There is no specific "right time" to purchase life insurance. Still, there are particular triggers in life that may prompt someone to be aware of their life insurance needs. Those life events can include having a child, purchasing a home, getting married, getting divorced, new debt, retirement, or wanting to leverage your assets for a charitable gift.

At Country Club Bank, we start by putting ourselves in our client's shoes. We focus on education and service rather than selling a product. Our tools will help you determine how much and what kind of life insurance you need. We want to deliver the best experience for our clients, tailoring a solution for your specific needs rather than a one size fits all approach.

Do you already have a life insurance plan? That's an excellent start! But, did you know you should review your plan on an annual basis? Another service we offer is a no-obligation, complimentary review to determine if it still fits your needs.

Whether you are looking for a simple insurance solution for family protection or seeking to leverage your legacy planning assets, Country Club Bank is here to help you. Wherever you are at in your life insurance journey, reach out to us today to insure your love and ensure your plan fits your life.

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