

Comprehensive Solutions and Services



At CBIZ Individual Insurance Solutions, we're dedicated to protecting what matters most to you, your family, and your business. We offer personalized insurance solutions and expert guidance at every stage, ensuring you have reliable coverage and lasting peace of mind.

Services

- **Fact-Finding Consultations:** Comprehensive assessments to understand client needs and goals
- **Policy Review:** Ongoing evaluation to ensure policies remain aligned with client objectives
- **Policy Management:** Proactive alerts for policy updates, renewals and important deadlines.

Our Process

- Pre-sale Case Consultation
- Case Management
- Case Design
- Underwriting Consultation
- Product Selection
- Product Placement
- Post Sale Service

Product Lines

- Life Insurance
- Annuities
- Life Settlements
- Long-Term Care Insurance
- Disability Income Insurance
- Executive Benefits
- Foreign National Life Insurance

Where Your Success Comes First

Stay confident knowing every detail is managed with care. Proactive support and tailored strategies keep you prepared and empowered to focus on what matters most to you.