



## POSITIONING INSURANCE SOLUTIONS AS FINANCIAL PLANNING TOOLS

At C2P Advisory Group, we mitigate risk for institutions, advisors and ultimately American families nationwide through sophisticated case design, agnostic product selection and implementation of insurance solutions as financial planning tools.

To learn more about contracting or additional resources available through C2P Advisory Group, email [Info@C2PAdvisoryGroup.com](mailto:Info@C2PAdvisoryGroup.com)

(<mailto:Info@C2PAdvisoryGroup.com>) or call us today at (844) 381-4115 (tel:844-381-4115).

LEARN MORE ABOUT OUR BEST INTEREST PHILOSOPHY  
([HTTP://C2PADVISORYGROUP.COM/OUR-PRINCIPALS/](http://c2p advisorygroup.com/our-principals/))

## WHO WE WORK WITH



### **Advisors**

(<https://c2p advisorygroup.com/advisors/>)

#### **How do I...**

- Effectively position fixed indexed annuities (FIAs) as a financial planning tool?
- Create appropriate documentation that my recommendations are in a client's best interest?
- Plug critical holes in my financial planning process and advisory business model?

LEARN MORE

([HTTPS://C2PADVISORYGROUP.COM/ADVISORS/](https://c2p advisorygroup.com/advisors/))



### **Institutions**

(<https://c2p advisorygroup.com/institutions/>)

#### **How do I...**

- Provide training and support to my advisors to use insurance products that meet best interest standards?
- Implement a proven streamlined documentation process for my advisors for me to easily review, analyze and sign-off?
- Give my advisors access to sophisticated product screening and evaluation to integrate insurance into a fiduciary financial plan?

LEARN MORE ([HTTPS://C2PADVISORYGROUP.COM/INSTITUTIONS/](https://c2p advisorygroup.com/institutions/))

# SERVICES



**Product  
Screening  
& Analysis**

(<http://c2padvisorygroup.com/services/#s1>)



**Annuity New  
Business  
& Policy**

(<http://c2padvisorygroup.com/services/#s2>)



**Case Design &  
Illustration**

(<http://c2padvisorygroup.com/services/#s3>)



**Licensing &  
Contracting**

(<http://c2padvisorygroup.com/services/#s4>)



**Compliance &  
Supervision**

(<http://c2padvisorygroup.com/services/#s5>)



**Product  
Training**

(<http://c2padvisorygroup.com/services/#s6>)

VIEW OUR SERVICES ([HTTP://C2PADVISORYGROUP.COM/SERVICES/](http://c2padvisorygroup.com/services/))

## LATEST NEWS



(<https://c2padvisorygroup.com/lifehealth-bill-richardson-named-svp-business-development-at-c2p-advisory-group/>)

LIFEHEALTH: BILL RICHARDSON NAMED SVP,  
BUSINESS DEVELOPMENT AT C2P ADVISORY GROUP  
([HTTPS://C2PADVISORYGROUP.COM/LIFEHEALTH-BILL-RICHARDSON-NAMED-SVP-BUSINESS-DEVELOPMENT-AT-C2P-ADVISORY-GROUP/](https://c2padvisorygroup.com/lifehealth-bill-richardson-named-svp-business-development-at-c2p-advisory-group/))

([HTTPS://C2PADVISORYGROUP.COM/LIFEHEALTH-BILL-RICHARDSON-NAMED-SVP-BUSINESS-DEVELOPMENT-AT-C2P-ADVISORY-GROUP/](https://c2padvisorygroup.com/lifehealth-bill-richardson-named-svp-business-development-at-c2p-advisory-group/))

C2P Advisory Group, a fiduciary-friendly insurance marketing organization (IMO), announced today that Bill Richardson has been ...

CONTINUE READING  
([HTTPS://C2PADVISORYGROUP.COM/LIFEHEALTH-BILL-RICHARDSON-NAMED-SVP-BUSINESS-DEVELOPMENT-AT-C2P-ADVISORY-GROUP/](https://c2padvisorygroup.com/lifehealth-bill-richardson-named-svp-business-development-at-c2p-advisory-group/))



(<https://c2padvisorygroup.com/marketwatch-the-bucket-plan-protecting-and-growing-your-assets-for-a-worry-free-retirement-now-available-at-hudson-news/>)

MARKETWATCH: “THE BUCKET PLAN: PROTECTING AND GROWING YOUR ASSETS FOR A WORRY-FREE RETIREMENT” NOW AVAILABLE AT HUDSON NEWS

([HTTPS://C2PADVISORYGROUP.COM/MARKETWATCH-THE-BUCKET-PLAN-PROTECTING-AND-GROWING-YOUR-ASSETS-FOR-A-WORRY-FREE-RETIREMENT-NOW-AVAILABLE-AT-HUDSON-NEWS/](https://c2padvisorygroup.com/marketwatch-the-bucket-plan-protecting-and-growing-your-assets-for-a-worry-free-retirement-now-available-at-hudson-news/))

Jason L Smith, a nationally-acclaimed speaker, financial planner, author, coach, and entrepreneur now has ...

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([HTTPS://C2PADVISORYGROUP.COM/MARKETWATCH-THE-BUCKET-PLAN-PROTECTING-AND-GROWING-YOUR-ASSETS-FOR-A-WORRY-FREE-RETIREMENT-NOW-AVAILABLE-AT-HUDSON-NEWS/](https://c2padvisorygroup.com/marketwatch-the-bucket-plan-protecting-and-growing-your-assets-for-a-worry-free-retirement-now-available-at-hudson-news/))

## GET STARTED

Interested in learning more about working with C2P Advisory Group?

## CONTACT TO LEARN MORE

([HTTPS://C2PADVISORYGROUP.COM/CONTACT/](https://c2padvisorygroup.com/contact/))

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