**INSURANCE BINDER OUTLINE**

The CUSO comprehensive Insurance Binder contains 8 separate tabs to segment the various risk management needs they may encounter. The final tab is designed to cross-pollinate with the private wealth side where appropriate.

Items in black are informational/educational pieces and items in blue are deliverables based on insurance solutions they are engaging in with you.

1. **LIFE INSURANCE**
* Life Insurance Educational Piece
* Life Insurance Policies
1. **LONG-TERM CARE & ANNUITIES**
* Long-Term Insurance Policies
* Annuities
1. **DISABILITY INSURANCE**
	* Disability Insurance Educational Piece
	* Disability Insurance Policies
2. **CRITICAL ILLNESS INSURANCE**
	* Critical Illness Insurance Educational Piece
	* Critical Illness Insurance Policies
3. **HEALTH & DENTAL COVERAGE**
	* Health Insurance Policies
	* Dental Insurance Policies
4. **TRAVEL INSURANCE**
	* Travel Tips & Informational Piece \*
	* Travel Insurance Policies
5. **GROUP/EMPLOYEE BENEFITS FOR COMPANIES**
	* Group Benefits Plan
	* Employee Benefits Plan
6. **FINANCIAL PLANNING**
	* Financial Planning Educational Piece
	* Financial Advisor Biographies