**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