

BLACK DIAMOND ANNUITY & INSURANCE MARKETPLACE

Provide Holistic Financial Planning with Insurance

The Black Diamond Annuity & Insurance Marketplace helps you grow AUM and deepen client relationships with best-in-class life, disability, and long-term care solutions.

Protect assets, create tax-free retirement income, and meet insurance needs, all while retaining control as your outsourced insurance desk.

How it Works

Our trusted team of licensed insurance consultants works with you to recommend the most suitable product for each client from our curated solutions. We handle the application process from start to finish, allowing you to focus on growing your business. From policy review to asset location and allocation, we simplify the integration of insurance into holistic financial plans. Certain consulting services may require membership.

What We Offer

Life Insurance

Life insurance can be a powerful tool to meet client portfolio needs. With term, whole, and universal life insurance solutions, clients can discover:

- A range of best-in-class products
- Flexible coverage options
- Options for market exposure and asset protection

Disability Income Insurance

Disability income insurance serves as a protection against loss of income for a period of time due to injury or illness, such as cancer, a fracture, or heart attack. Despite concern about being able to cover expenses if temporarily disabled, most Americans do not own disability insurance, often citing lack of knowledge or indecision. We can help you find the right solution for your clients.

Long-Term Care Insurance

An effective long-term care plan can protect clients from life-altering financial, emotional, and physical consequences resulting from a prolonged health event. We can help you:

- Evaluate traditional and hybrid policy types
- Understand coverage options
- Identify funding sources
- Have a productive conversation with clients

Why Use AIM

EASE: Provide insurance solutions via our licensed agents without having to maintain your own licenses.

ACCESS: Expand offerings with holistic financial planning.

CONTROL: Bring insurance under your fiduciary umbrella.



For more information

To learn more about accessing life insurance solutions with AIM, contact us today:

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