

Provide Holistic Financial Planning with Insurance

AIM's best-in-class insurance solutions can help grow your firm and retain clients.

Protect your client's assets, create tax-free retirement income, and more with our expanded insurance solutions, including life, disability, and long-term care. With AIM as your outsourced insurance desk, you can grow AUM, fulfill clients' insurance needs, and retain control of the relationship.

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 process the application from start to finish so you can focus on growing your business. From policy review to asset location and allocation, we make incorporating insurance into holistic financial plans easy.

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 their ability to cover expenses if temporarily disabled, most Americans do not own disability insurance, often citing lack of knowledge or indecision. We can help your clients find the right solution.

LONG-TERM CARE INSURANCE

An effective long-term care plan can protect clients from life-changing financial, emotional, and physical consequences caused by a long-term 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.

Contact Us

For more information on accessing life insurance solutions with AIM, contact the AIM Consulting Team at (888) 680-0830 or email us at AIM@dplfp.com.