



THE 6 CORE VALUES OF RPG INSURANCE SOLUTIONS

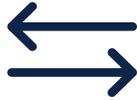
ORGANIZATION



ACCOUNTABILITY



OBJECTIVITY



PROACTIVITY



EDUCATION



PARTNERSHIP



1. ORGANIZATION:



At RPg Insurance Solutions, we bring order to your financial life by assisting you at both the “macro and micro” levels of your financial goals. Through an in-depth analysis of your assets including insurance, estate needs and taxes, as well as household cash flow, we help clients achieve their most important financial goals.

2. ACCOUNTABILITY:



Through detailed financial planning, we help prioritize your goals and outline the steps necessary to achieve them. We work collaboratively with you to meet all financial commitments and regularly review your progress along the way.

3. OBJECTIVITY:



Our financial expertise ensures that you see the full picture when it comes to critical money matters. We do extensive research to provide the information necessary to avoid emotionally-driven decisions. We consult with you at every step along the way, most importantly, at key decision-making moments.

4. PROACTIVITY:



We work closely with you to be financially prepared for the future by anticipating tax and life transitions. We regularly assess what is on the horizon and create a detailed action plan designed to manage current finances. In addition, we work proactively to identify and address any unforeseen obstacles ahead of time.

5. EDUCATION:



We strive to educate you on the detailed strategies necessary to succeed. First, we gain a thorough understanding of your unique situation, then we provide the necessary resources to facilitate your decisions. We explain the options and risks associated with each scenario.

6. PARTNERSHIP:



As a trusted fiduciary, we help you achieve maximum success by working collaboratively to understand your background, philosophy, needs and objectives. We are committed to maintaining transparency around our cost structure and compensation. Our mission is to help you live the best life possible.

IMPORTANT DISCLOSURES

RPg Insurance Solutions does not provide tax or legal advice. Please consult an independent tax advisor for additional guidance.

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