Client
(You)

Agent & Wealth Consultant

Case Manager

US LIFE

Walks Client Through Application Process

Assists Through Underwriting Until Policy Funding

Strategist

US LIFE

Creates Designs

Provides Annual Reviews

Provides Details and Strategies of The Flexmethod®

Lending Specialist

LOCHRIDGE LENDING INC.

Policy Loans

Bridge Loans

Streamlines and Simplifies Lending Process

Wealth Manager

Optional

DESERT ROSE capital management

Registered Investment Advisor

IOP Strategy

Dual Purpose Cash Value Loans

Tax Partner

Optional

Excel Empire

Mitigate Client Taxes

Save on Business Sale Taxes

Personal Taxes

Provide Bookkeeping

Flexmethod®