

Business & Estate Succession. Consulting & Cross Marketing with Gallagher

Partner under ARM Agreements to compliment Services you provide **High Net Worth clients.**

Corporate Executives | "C" Suite Employees | Closely held Businesses | Business Owners
Help them Plan, Perform & Perpetuate

Earn substantial referral fees and residual income | manage the client interface process, attorneys, accountants, etc. | work with Gallagher's "A" Team of Business Succession Professionals.



Mike Roberts

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Supporting ARM

Members of...

Maine, Vermont, New Hampshire, Massachusetts, Connecticut, Rhode Island, New York, Pennsylvania, New Jersey, Delaware, Maryland, D.C., West Virginia, Virginia, North Carolina, South Carolina, Georgia, Florida

My focus is wealth and risk transfer for all income levels for employers, employees and "C" suite executives and their families. Along with my prospects' and clients' other advisors, we work together to mitigate risk in the most tax efficient manner allowed. I specialize in all types of life insurance-disability income protection-Long Term Care Insurance and Annuities.



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As a certified business and estate succession consultant I focus on the risk management process with clients in an effort to identify all risks, gaps and exposures. My reports and analysis help clients make well informed decisions based on multiple solutions and potential outcomes. My considerations often include insurance and non-insurance products / solutions to achieve the most efficient and effective outcome.

Supporting ARM Members of...

Ohio, Kentucky, Tennessee, Alabama, Mississippi, Michigan, Indiana, Louisiana, Wisconsin, Illinois, Missouri, Arkansas, Minnesota, Iowa, North Dakota, South Dakota, Nebraska, Kansas, Oklahoma, Texas, Montana, Wyoming, Colorado, New Mexico, Idaho, Utah, Arizona, Washington State, Oregon, Nevada, Arizona, California, Alaska, Hawaii.