

ABOUT MARCUM INSURANCE

Marcum Insurance Services is a dedicated consulting practice, assisting individuals and businesses to identify and address their unique insurance needs.

As part of the Marcum Group, our insurance team collaborates with specialists in complementary disciplines in order to create a custom insurance plan, with a focus on risk management and tax efficiency. Our process is driven in concert with your overall financial plan.

OUR SERVICES

Personal Insurance Planning

Whether you are evaluating existing coverage or seeking new insurance, the Marcum Insurance team can assist you with selecting the right product and the proper design. Optimal planning utilizes the right policy, best funding options, trust structures and tax planning.

Business Insurance Planning

Planning for a business owner can involve funding buy/sell agreements, creating owner liquidity, establishing plans to keep and retain key employees or making your business more attractive for an exit.

Long-Term Care Planning

Within a financial plan, a risk management tool, often overlooked during retirement is Long-Term Care (LTC) Insurance. Securing long-term care insurance is one way to prepare.

Medicare & Senior Planning

It can be daunting for individuals to navigate the complex Medicare process without proper guidance. We offer a personalized service that simplifies the maze of Medicare options available to individuals.



Headquartered in Cleveland, OH



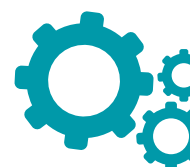
Insurance design collaboration with Tax, Legal, and other necessary advisors



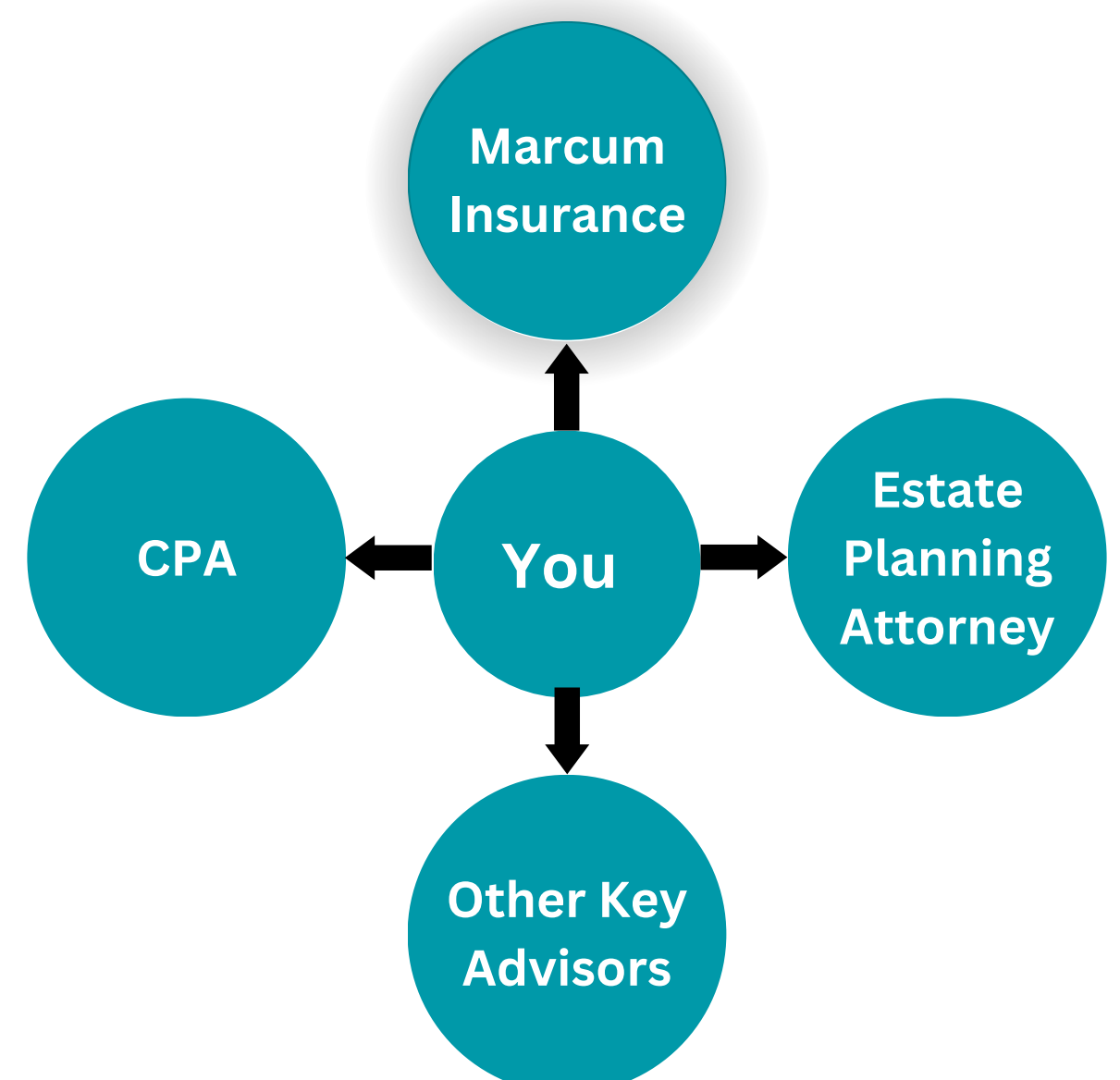
Upheld by excellent client service standards



Access to insurance products with nearly every major quality insurance company



Top quality systems for insurance analysis, design, and ongoing service



DID YOU KNOW?

A regular audit of insurance can lead to better performing insurance policies, proper estate administration, lower tax liabilities and family harmony.

WHAT DEFINES US

As part of the Marcum group, we strategize with your team of advisors to educate you about your insurance needs, while providing you with a complete assessment and detailed plan. Our planning-first approach helps to ensure our recommendations for insurance are most appropriate for you and your family.

► OUR EXPERIENCE

We service individuals and businesses to help preserve, grow, and transfer their most valuable assets with a focus on tax efficiency.

► WHAT WE PROVIDE

We provide comprehensive insurance placement for all clients from the most simple requests to the most complex.

► HOW WE'RE DOING IT

We leverage our position as a leading insurance advisory team to obtain the best solutions for our customers while distilling the insurance solution into an easy to understand plan.

► WHY WE'RE DIFFERENT

Our insurance team creates a plan with your entire financial picture and goals in mind. Insurance can play a vital role as a portion of your overall planning.

IMPORTANT DISCLOSURE INFORMATION

**Securities offered through Valmark Securities, Inc. Member FINRA, SIPC. Advisory Services Offered through Marcum Wealth, a SEC registered Investment Advisor. Marcum Wealth and Marcum Insurance Services are separate from Valmark Securities, Inc.*

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THE MARCUM GROUP

As part of the Marcum Group, we provide a comprehensive range of professional services, spanning accounting and advisory, technology solutions, wealth management, risk management and executive and professional recruiting.

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To schedule a consultation, please reach out to us:

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