🍂 A New Season, A Stronger Financial Plan

The Autumnal Equinox: A Reminder to Review, Rebalance & Protect

Around September 22 or 23, the Autumnal Equinox marks the official start of fall—a natural transition from one season to the next.

For financial advisors, September can be the perfect time to encourage clients to do something similar with their financial plans: pause, review what has changed, and make sure the plan is prepared for the season ahead.

Income is at the center of almost every financial goal.

An individual disability policy can help protect that income if an illness or injury prevents a client from working.

As you are meeting with clients this fall, consider asking:

🍁 If your income stopped tomorrow, how long could your financial plan continue?
🍁 Would your existing employer benefits be enough?
🍁 Has your income, occupation or financial situation changed since your last coverage review?
🍁 Are you protecting the income that makes your entire financial plan possible?

The change of seasons is a great reminder that financial plans shouldn't be set on autopilot.

Review the plan. Identify the gaps. Protect the income.

This fall don't just plan for what your clients want their money to do. Help protect the income that makes it possible.

Here at **NCDI**, we love helping you support your clients. We also offer **advisor-focused DI training**, so you can learn more about how disability insurance can help you provide real value and protection to the people you serve.

NorthCentral DI is your one-stop resource for all your disability insurance needs. We are here to assist with case design, illustrations, pre-screens and even income documentation review! Please give us a call at 866-598-0020 or email us at 3mark@northcentraldi.com.

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