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ARI™ FINANCIAL GROUP
ADVANCED LIFE INSURANCE CONCEPTS

ARI ADVISORY SERVICES

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ARI Advisory Services, an affiliate of ARI Financial Group, is a new insurance advisory firm specializing in partnering with insurance advisors and agents, both domestically and internationally. Our objective is to provide advanced insurance solutions to High Net Worth and Ultra High Net Worth individuals and families, specifically utilizing Premium Financing.

With the intention to assist advisors sell, implement and service premium financing strategies, our purpose is to give insurance advisors and agents a platform to access ARI's expertise and to educate and empower them to provide responsible and sound solutions to their clients.

ABOUT ARI FINANCIAL GROUP

ARI Financial Group is the leading premium financing boutique and a leader of life insurance with Guardian and other mutual carriers.

Our top-notch advisors look beyond basic financial needs and beyond the present day to optimize clients' assets and to protect their wealth and cash flow.

From the design of each client's financial strategy to the implementation of that plan, and to the annual review of the policy, ARI Financial Group's innovative group of seasoned financial professionals offers premier service.

THE ARI WAY

Our clients receive only the highest level of skill and expertise when partnering with us.

INITIAL DESIGN

Strategy specifically tailored to each client's objective.

IMPLEMENTATION

Seamless underwriting process conducted by an ARI expert.

SERVICING

Proprietary grading system to help evaluate policy performance.

ERIC BOUSKILA
President & CEO

Eric Bouskila is recognized as one of the top leading advisors with the largest mutual insurance companies in the country, consistently breaking the record for life insurance production year after year and a recipient of Guardian's Top Advisor Nationwide Award for the last seven consecutive years. Eric excels in structuring innovative and cutting-edge leveraged planning strategies geared toward high-net-worth individuals.

PETER HARJES, CFP*
Chief Financial Strategist

Peter Harjes, CFP®, is our Chief Financial Strategist and Head of ARI Advisory Services. With fifteen years of experience in the insurance industry, Peter utilizes his expertise to devise how clients can accommodate and benefit from including insurance solutions into their overall financial and estate plans. Peter established his reputation in the insurance industry because of his novel solutions and personalized client approach.

JEANNE LECONTE
Business Development Manager

Jeanne Leconte, is responsible for developing agent relationships and end-to-end case management. She has an extensive legal background and synthesizes her various disciplines to develop customized planning solutions and unparalleled 360-degree strategies on behalf of her clients. Her experience in credit analysis and underwriting of insurance loan packages position her as an expert on design and implementation of financial strategies.

OUR DIFFERENTIATOR
WE OFFER YOU ACCESS

ACCESS TO OUR EXPERTISE

ARI has consistently been a leader with Guardian and other top mutual carriers for the past 10 years, not only in premium financing but in nationwide life insurance production. We have a unique ability to implement solutions extremely quickly.

ACCESS TO SOPHISTICATED LENDERS

ARI has developed relationships with a platform of over 2 dozen top-tier lenders, including both private banking and traditional premium financing lenders, with preferred lending rates.

ACCESS TO PREFERRED UNDERWRITERS

We know how to properly present each candidate to underwriters who understand the strategies we implement, understand the clientele we work with and have tremendous comfort with cases we submit.

ACCESS TO OUR HIGHEST-LEVEL SERVICE PLATFORM

Servicing is crucial to implementation. Our concierge servicing, along with our proprietary performance monitoring, provides for the most optimized premium financing solution available in the market.

INTERNATIONAL CLIENTELE
WHERE WE EXCEL

At ARI we recognize that global citizens require high-level financial planning and unique solutions that are focused on each individual's specific needs. Our expertise for the foreign national clients is supported by physical global presence and a multilingual staff who have a deep understanding of international tax implications, global financial structures and the ever-changing political climate, including an in-house dedicated LATAM bilingual team that can cater to your Latin clients.

We have the experts and team structure in place to ensure that our foreign national client's needs are resourcefully managed. We have a unique ability to obtain coverage for Global Citizens and tremendous experience in positioning the benefits of this product to international clients.

HOW WE CAN HELP YOU
PARTNERSHIP OPTIONS

Features	Basic Support	Standard Support	Premium Support
Access to the ARI Platform	✓	✓	Designed for those who either want to refer clients and step away or for those who recognize the ARI ability and experience to handle the case entirely. The advisor hands over the case to ARI and we run everything from presentation to implementation, to servicing. This option allows the advisor to sit on the same side of the table with the client and act as an advocate and not a salesperson.
Illustration Support	✓	✓	
Credit / Medical Underwriting	✓	✓	
Implementation	✓	✓	
Ongoing Servicing	✓	✓	
Initial Client Presentation		✓	
Follow-up Support		✓	

ARI Advisory Services optimizes and customizes different aspects of the contract depending on each client's needs. Contact us at advisory@ari-fg.com for more information on how we can help you grow your business through personalized service and innovative planning.