

ANDREA V. BURCKHARD

LUTCF[®], CAP[®], CLTC[®], RICP[®]

Founder/Principal

Organize. Protect. Your Families Future.

SERVICES



PERSONAL STRATEGIES:

- Personal Insurance
- Retirement Planning
- Estate Planning
- Wealth Strategies
- Legacy Strategies
- Charitable Giving Strategies
- Estate Conservation and Strategies
- Retirement Strategies
- College Funding Strategies
- Traditional IRA/Roth Ira Funding*



BUSINESS STRATEGIES:

- Buy-Sell Agreements Funded With Life Insurance
- Executive Bonus
- Key Man Insurance
- Executive Compensation
- Business Continuation



INDIVIDUAL PERSONAL SOLUTIONS:

- Individual Life Insurance
- Individual Disability Insurance
- Individual Long Term Care Insurance
- Individual (Fixed/Variable) Annuities
- Individual Retirement Income and Distribution Strategies



EMPLOYEE BENEFIT & VOLUNTARY PAYROLL DEDUCTION PROGRAMS:

- **Guarantee Issue Whole Life Insurance***
- **Worksite Long-Term Care Insurance**
- **Retirement**
(401k, 457, 401A, SEP, Roth IRA, Simple IRA)
- **Group Benefits**
(Life, Short-term, Long-term Disability, Critical Illness, Accident, Dental and Vision)**



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Proud to Offer



*# Registered Representative offering securities through NYLIFE Securities LLC (Member FINRA/SIPC), A Licensed Insurance Agency. *New York Life Employees Whole Life Insurance is issued by New York Life Insurance Company. This program is not intended to be subject to the Employee Retirement Income Security Act of 1974 (ERISA). Employee participation is completely voluntary. The employer does not contribute to or endorse the program. In Oregon, the Employee Whole Life policy form number is ICC17-217-52P. ** Products available through one or more carriers not affiliated with New York Life, dependent on carrier authorization and product availability in your state or locality. All financial product guarantees are dependent on the claims paying ability of the issuing company.*

FINANCIAL PEACE

Holistic Advice and Trusted Guidance

15 YEARS

of international business experience in Europe prepared me for my lifelong career as a financial professional with New York Life and gave me an insight in life working with business owners and families like yours. Upon returning to the U.S., I became newly married and the mother of twins. I quickly realized how vital financial preparation was for my family. My experience as a business entrepreneur, coupled with the financial strength of New York and their exceptional training and resources, enables me to help you both formulate and achieve your financial goals.

GIVING BACK

is a part of my, "WHY" and I love making an impact in the community and the organizations that I serve. As a lifelong learner, I strive to master my craft and offer cutting-edge strategies and processes to strengthen financial goals, and personal client relationships. Giving back also encompasses charitable and philanthropic goals that can be implemented in these plans to strengthen the community and your family legacy.

LIFE'S JOURNEY...

has allowed me to understand, relate, and empathize with business owners and families. Life's ever-changing events can alter your goals and desires, and with my help, we can monitor and navigate you through your financial journey.



MAY OF 2019, my husband Terry suffered a stroke and I found out firsthand how important it is to be prepared for the unexpected. I specialize in helping my clients make these preparations, as it happened to our family. Now I can speak from personal experience on what helped our family when I assist you in helping yours. Extended care can be life-altering but does not have to be life-ending. The key is preparation. I proudly live and work in the Cookeville community and serve the entire Upper Cumberland region and Tennessee. Please call me so we can make sure you are better prepared to face the unexpected challenges that life can bring.

HOLISTIC GUIDANCE | PREPARE PROTECT | BUSINESS SOLUTIONS

www.BurckhardFinancialGroup.com