Blaine K. Johnson, LUTCF®, CLTC®

Blaine K. Johnson
Financial and Insurance Services

"We focus on developing and maintaining **STRONG**, long-term relationships with our clients based on performance, **INTEGRITY** and **TRUST**."

# Meet Blaine K. Johnson, LUTCF®, CLTC®

Blaine Johnson is an agent with New York Life Insurance Company, a member agent with The Nautilus Group®, and a financial professional.

He specializes in providing financial and insurance services for professionals and business owners. By focusing on a particular clientele, he can provide a customized approach.

Passionate about education, Blaine is a Life Underwriter Training Council Fellow (LUTCF®) and holds the Certified Long-Term Care designation (CLTC®). As a LUTCF®, he has a thorough understanding of the insurance industry and how it can impact and integrate with his clients' financial strategies. With the CLTC® designation, he is highly trained in long-term care and intricacies that go into long-term care planning. In helping you solve your needs, he works closely with other professionals, including elder law attorneys. Blaine also holds a bachelor's degree from California State University, Chico, and is a member of the National Association of Insurance and Financial Advisors (NAIFA).

We strongly believe in our clients' financial futures and we want to help them clarify their planning concerns and work with them for many years to come. As seasoned professionals, we understand the unique concerns and busy schedules our clients face. Our mission is to help them get on track for the future and navigate the path toward their goals.

# SERVICES

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## Insurance

Establishing proper insurance coverage is critical to creating sound financial strategies, whether it's to insure that your family is taken care of, your business is protected, or long-term care costs are covered.

## Retirement Planning

Income planning is a critical element of a solid retirement strategy. A primary financial goal is to have a consistent and reliable stream of income that will last through retirement.

## Estate Planning

Many individuals want to leave a legacy for their families, loved ones, charities, or causes. Estate planning is critical for ensuring your wishes are carried out.

## Education Funding

A major concern among families is determining how they will pay for their children's college expenses and balance their retirement planning.

## Charitable Giving

Many affluent families wish to see the fruits of their labors translated into good works.

## Business Strategies

Diversifying assets can help small business owners protect their businesses, futures, and families.

## Succession Planning

A succession plan is a critical element of a business owner's exit planning strategy.

Creating a Financial blueprint that will help guide you to the next step in your life.

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# Getting Started

It can be intimidating meeting with a new person and sharing the intimate details of your financial life, your retirement dreams, and your investment fears. But there is no time like the present to take the first step toward a brighter financial future.

In an industry that can seem confusing and full of jargon, our goal is to use understandable concepts and everyday language to simplify the complex. From the moment you walk into our office, we want you to feel comfortable and at ease as if you're meeting with an old friend.

We strive to make it easy to start the process. With every new client, we begin with a no-obligation consultation. During our meeting, we'll take the time to get to know each other and determine how we can assist you in articulating and prioritizing your financial goals and dreams.

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FINANCIAL SUCCESS REQUIRES MUCH MORE THAN AN INVESTMENT PORTFOLIO, INSURANCE POLICIES, AND A PLAN IN PLACE. YOUR NEEDS OR GOALS WILL LIKELY CHANGE OVER TIME AND, WITHOUT EDUCATION AND GUIDANCE, IT CAN BE HARD TO STAY ON TRACK AND KEEP YOUR FINANCIAL STRATEGIES UP TO DATE.

# RESOURCES

The Nautilus Group® is an exclusive, membership - based resource accessible to an elite group of experienced insurance and financial industry leaders who, like myself, are firmly committed to a team planning concept. Nautilus members work with affluent, high net worth and business owner clients, professional athletes, professional entertainers, farmers and ranchers, physicians, corporate executives and retired executives.

Nautilus provides a range of consultative services and technical case design to support me in presenting estate, business, charitable, insurance and retirement strategies to my clients in these key areas:

- Family Protection
- Estate and Legacy Planning
- Business Succession and Exit Planning
- Executive Benefits
- Philanthropy

"WITH THE POSSIBLE EXCEPTION OF LINDBERGH, MOST SUCCESSFUL JOURNEYS ARE NOT SOLO."

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