

Employee Benefits  
Business Insurance  
Life Insurance  
Retirement Planning  
Personal Insurance

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## Wharton Insurance

Service  
Dedication  
Expertise



## Service. Dedication. Expertise.

These are the mission of Wharton Insurance – providing businesses and individuals with custom tailored products to keep them secure in the face of life's challenges.

We offer comprehensive business and personal insurance protection, among other areas of coverage. You'll gain peace of mind through working with our trained and licensed professionals, and you're always considered one of the family. Wharton Insurance & Financial Services, Inc., was founded on client-centric service and a total-account approach to solving our customers' insurance objectives and requirements. By working with WIFS, which is proficient in a variety of industry disciplines, you are assured more focused, timely and knowledgeable responses to your needs no matter the line of

coverage. At WIFS, our clients have come to appreciate and value the diversity of our product offerings. We identify the time at which it becomes prudent to approach our clients and future clients, typically when the coverage is up for renewal. It is at that point that we believe our services are going to mean the most to you. Why? We believe it is because we'll deliver to you the best policies, pricing and assistance. That emanates from the convergence of all our resources with your explicit needs. We pride ourselves on that, and our clients have come to expect it, and we trust you will, too.



### INSURANCE SOLUTIONS

- Employee Benefits
- Health Insurance
- Life Insurance
- Dental Insurance
- Property and Casualty
- Retirement Plans
- Business Personal Property
- Specialized Business Insurance

### CUSTOMER TESTIMONIAL

"I love doing business with Wharton and we have used them for over 10 years. Whenever I talk with them, it's like I'm speaking with a friend because they are so professional and pleasant. Better yet, they are always available to explain things to me and our employees. When we recently introduced health-savings accounts to our employees, Scott came out frequently to talk with us one-on-one about the policy and explained it all to our team. We had a record sign up on the day we introduced it to our employees. In fact, I like them so much I refer them to my friends and family."

- *Connie Perrin, Controller, American Newlong*

## flexible solutions for your business needs

Wharton Insurance provides a complete approach to your specific requirements.

### Protecting your business

In today's economy, business owners are concerned about how to identify and plan for a variety of risks. Wharton is here to help. Business insurance serves to protect the most important parts of your business – including your property, your security, and the health and well being of your employees.

With our years of experience in the business, we believe that securing business insurance has never been more important, or offered more value, than today. From the smallest in-home startup to large corporations, business insurance is a vital piece of operating and growing any company.

We know that your business is unique. Whether you are a manufacturer or service provider, every business is made up of a variety of moving parts with varying needs and risks. Working closely with you and your organization, our team of experienced agents will find the right solution for your business and your employees.

To ensure that your employees fully understand their insurance options, Wharton is available to provide on-site presentations about new policies. It's our pleasure to spend time with you and your people so everyone is clear on how the policies work.

### Protecting your home and family

Wharton is pleased to offer you hands-on, personal service to safeguard your family and possessions. We work hard to understand your special requirements, and we find the right policies to serve you best and give you peace of mind.



Whether it's home, auto, or life insurance, we are here to help you achieve your financial goals and keep your family secure.

At Wharton, we don't think that selling you a policy and walking away is enough. Everyone goes through change in life, and we want to be sure your coverage is

up-to-date for you, your family, and your business. We make it our goal to stay in touch through the years to be sure your insurance remains effective.

After all, keeping your family safe from life's challenges is what we're all about.

### BUSINESS INSURANCE

The viability and success of a business, whether it is a large corporation or small business run out of a home, is in great measure dependent on diligence and resourcefulness. No matter how conscientious one is about his or her business operations, one catastrophe could obliterate all profits and even destroy the business. Wharton Insurance & Financial Services is at the ready to service your needs – and to protect your business and all you have invested in it.

### HEALTH INSURANCE

Insurance that covers your illnesses and wellbeing, at times, can be somewhat confusing and worrisome. Whether covering a business or an individual, we help you find the policy that is right for you. But we don't stop there. We also help you and your employees understand benefits and circumvent some common frustrations that can arise. Health insurance policies vary in terms of what they will cover. Taking the time to talk with us to better appreciate your policy and how it works is important; it's our investment in you.

### LIFE INSURANCE

If you own a business and you wish to guarantee its succession, or if you are an individual with dependents or other people with whom you share your life, or even if you are single, life insurance can play a vital and valuable role at virtually every stage of your life. Wharton Insurance & Financial Services will assist you in making educated decisions when buying life insurance. If you're wondering, as many do, how much to buy; which type of product to buy; and which one of the hundreds of life insurance companies to choose, we'll give you the direction you need and deserve.