

Everything we do builds from this “people first” foundation.
More than just words in a motto, it’s a credo we live by.



The Success Financial Solutions Experience

At a time when it’s hard to distinguish one insurance company from another, Success Financial Solutions is unique in the industry. We are dedicated to making insurance decisions easier, more informed, and highly personalized for our clients.

IT STARTS WITH A CONVERSATION. Whether meeting through a referral, a chance encounter, or at an information seminar, our first contact begins an important, trusted relationship. Face-to-face communication allows agents and clients to build enduring partnerships.

WHAT KEEPS YOU UP AT NIGHT? Instead of asking “what insurance do you need” we take a step back to explore what worries you about the future.

- ▶ **Outliving my retirement savings**
- ▶ **Dying unexpectedly**
- ▶ **Worrying if I have enough health insurance**
- ▶ **Draining my nest egg to pay for home health care or nursing home care**

WE GO TO WORK TO FIND SOLUTIONS.

Relationship-Based Contact Cycle

- ▶ **Customer contact**
- ▶ **Needs analysis**
- ▶ **Relationship-driven action steps**
- ▶ **No sales required** - we discuss options and give you a full understanding of the best protection and price for you.
- ▶ **Fulfill insurance inquiries, as requested.**
- ▶ **Ongoing communication** (whether client acts on the opportunity or not) **such as annual reviews, birthdays.**

WHAT SETS OUR AGENTS APART. Although we represent a large number of top rated companies, they do not employ us, **WE WORK FOR YOU.** This allows us to look at your unique insurance needs, locate the best solution for you and to make sure you are getting the best value for your insurance dollar.

THE EXTRA MILE – THE SAGE PRIVATE COLLEGE SCHOLARSHIP PROGRAM. Our clients have access to Tuition Rewards through SAGE Scholars, Inc. This program can provide an invaluable benefit for children in your family and costs you absolutely nothing.

FACTS IN BRIEF

- ▶ Success Financial Solutions is a leading distributor of Senior Market insurance products.
- ▶ **A+** Rating with the BBB since 2010.
- ▶ Success Financial Solutions is powered by American Senior Benefits which is one of the fastest growing independent marketing organizations in the country and has more than 1,400 affiliated agents operating out of 100+ nationwide locations.



WE WORK WITH **THE BEST**

Our affordably priced health, life and annuity products are from the most highly rated carriers.

- ▶ **Medicare and Medicare Supplement Insurance**
- ▶ **Long-Term Care Insurance**
- ▶ **Life Insurance**
- ▶ **Annuities/Retirement Planning**
- ▶ **Specialty Health** (Dental, Vision, Critical Care)

Success Financial Solutions | Brian Goldman, Financial Advisor, Sales Mentor

875 GREENTREE ROAD, BUILDING 7, SUITE 102 | PITTSBURGH, PA 15220
(412) 897-0760 | brian.goldman@successfs.com | www.successfs.com