



Incorporating Insurance Into Your  
Advisory Practice Is A Smart Move.

Integra Makes It Seamless and  
Simple.



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INTEGRA WORKS TO  
SUPPORT ADVISORS  
DIRECTLY TO INCREASE  
THEIR VALUE TO THEIR  
CLIENTS, MITIGATE  
OUTSIDE COMPETITIVE  
SITUATIONS AND  
REDUCE ADVISORS'  
WORKLOAD.

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# ABOUT US

Integra, was created to become the integral part of an advisors' planning process to evaluate and execute the insurance needs of a clients plan.



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TRANSPARENCY AND  
INTEGRITY ARE THE WORDS  
WE USE TO GUIDE OUR  
WORK WITH ADVISORS AND  
CLIENTS.

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# PROBLEMS WE SOLVE



## FEE ONLY ADVISORS

We provide insurance solutions for your clients, keeping them safe from outside agents and sales tactics and giving you peace of mind.



## LICENSED ADVISORS

We provide you with intel and planning ideas while managing all the back office and servicing needs for your clients.