ADVISOR OVERVIEW

Waterlily + Wealth Assurance Group

Your long-term care team.

Built around your practice.



When long-term care comes up, most advisors have a process — some version of allocation, tax harvesting, or a policy they placed years ago. The question isn't whether your approach works. It's whether your clients are seeing the full picture.

Waterlily brings the latest in predicting care needs, timing, and cost — specific to each family — and puts it side by side with their current plan. Insurance options, self-funding strategies, and hybrid approaches are compared in one place, so the recommendation fits the client, not just the product shelf.

The result is a custom-tailored process for your practice. One that handles LTC the way your clients deserve — without rebuilding your knowledge of products, underwriting, and carriers every time it comes up.

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Your client already trusts your process.

A named owner within one business day.

We acknowledge your introduction, assign a case owner and confirm the next step.

Before placement | Weekly case updates.

While the case is active, we send status, next action, owner and follow-up date—even when waiting on a carrier. Your firm can approve a different cadence.

Respect for your relationship.

We stay within the agreed LTC scope, with no unrelated sales outreach or solicitation of investment management. You retain the primary advisory relationship.

An advisor-led introduction.

With client permission, we agree on who reaches out, when and why. Suggested script: “I’ll remain your advisor for the overall plan. I’m bringing in WAG for specialized LTC analysis and insurance coordination, and we’ll make decisions together.”

At the decision | A clear outcome.

Whether the client insures, self-funds, combines approaches or defers, you receive the outcome, remaining gaps and next steps, with client authorization. If coverage is placed, we identify the ongoing service owner.

Send us one client question. We'll prepare the introduction, agreed communications and service plan.

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