CLIENT COMMUNICATIONS

Waterlily + Wealth Assurance Group

More LTC support.

You stay the advisor.



Your client already trusts your process. WAG adds a specialized long-term care team—not a new primary advisor. You approve the introduction, choose your involvement and stay informed.

A named owner within one business day.
We acknowledge your introduction, assign a case owner and confirm the next step.

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.”

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.

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Early notice when something changes.

Delays, changed offers and client concerns are surfaced promptly. We bring you into decisions that affect the financial plan, with the client's authorization.

Follow-through you can delegate.

We coordinate information requests, application follow-up and underwriting questions. If your client stops responding, we tell you when your help is needed.

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.

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.

After placement | Ongoing policy care.

Where offered and elected, clients and advisors can receive periodic policy/benefit reviews, reminders, rate-action guidance and updates when needs change. The scope, cadence and any service fees are agreed separately; WAG coordinates with your practice.

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

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