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A private wealth advisory practice of
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Anya Leybovich
Siegel Insurance
2987 Clairmont Rd, NE
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Anya,

As you know, insurance has not been the most popular of topic in our house over the past few years. Having two teenage drivers can make auto insurance an absolute nightmare, let alone having \$20,000 in homeowners claims from a cast iron pipe mishap during the Pandemic. After my oldest daughter was involved in her first little fender-bender our auto rates went up to \$1,200/mth! If that wasn't bad enough, the accident prevented us from shopping it around with other carriers. We were stuck! The advice you gave me to wait until the accident dropped off before trying to switch seemed counterproductive, but that advice paid off this month when you were able to shop our home/auto policies and present us with multiple offers. You were able to put us with a reputable carrier and save us a staggering \$7,000/year on our coverage.

It doesn't take a Certified Financial Planning designation to understand the impact that \$7,000/year can have on a budget. But let me articulate....

- \$7,000 is more than the IRS will allow you to contribute to a Roth IRA in 2022.
- \$7,000 is enough to book a 7-day Caribbean Cruise for a family of 4! (Not that's I'd take a cruise right not, but)
- \$7,000 is enough to pay for half of my daughters Fall tuition at NC State or pay for her to travel abroad next semester. And we all know that travel is the best teacher!
- \$7,000 would be a meaningful charitable donation to Children's Healthcare of Atlanta's Research division, where my wife works. Who knows, it could literally help find a much-needed cure or get that critical medical device approved for use with kids.

I think you get the point! My entire family thanks you for helping us save such a meaningful amount on our insurance coverage. Not only will I recommend you to our friends and family, but I will recommend you to the financial planning client at Endurance Planning Group that need a trustworthy insurance agent. Your hard work, persistence, and determination to provide quality coverage at an affordable price is a shining light in and industry that just seems focused on driving up rates.

Keep up the great work and thank you again!

Chad Meisner, CFP®
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