



GATEWAY LEGACY INSURANCE SERVICES

CAPABILITY STATEMENT

Gateway Legacy Insurance Services is a full-service insurance brokerage firm offering a diverse range of insurance services to both the domestic (U.S.) and international affluent clients. We are dedicated to being our clients' advocate and resource for all their insurance needs. We work diligently to develop a coordinated protection plan to help shield their hard earned assets against the potential impact of unexpected life events and financial uncertainties.

CORE

- 14 years of service in the insurance industry
- Serving high net worth clients in designing and implementing advanced insurance solutions focusing on estate tax planning, estate legacy planning, wealth transfer, and family business succession planning
- We provide risk management services for nearly all types of coverages, such as, personal, business, employee benefits and health insurance.

SERVICES

- U.S. based Life Insurance when structured properly can be used as a valuable alternative investment to diversify a portfolio and to hedge against investment risk
- Business Succession Planning, Executive Benefits, Buy-Sell, Key Person Life Insurance, and Employee Benefits
- Estate Planning Strategies - Wealth Transfer, Estate Tax & Liquidity Planning, Estate Equalization, Charitable Planning, Foreign National Insurance Planning
- Personal Lines: Home, Auto, Boat/Yacht, Jewelry, Fine Art, Umbrella/ Excess Liability (High-Valued Items), Flood, Earthquake
- Business/ Commercial Insurance: General Liability, Business Auto, Cyber Risk, Crime, Director/ Officer Liability, Kidnap & Ransom, Workers' Compensation
- Health Insurance, Dental, Vision, Accident Insurance, Accidental Death & Dismemberment Insurance, Critical Illness/Cancer, Hospital, Limited/Short-Term Medical Plan

INDUSTRIES

- Agricultural Business
- Architects & Engineers
- Auto Dealers
- Cleaning Janitorial
- Construction
- Energy & Renewable
- Entertainment & Sports
- Financial Services
- Food Service
- Healthcare
- Hospitality - Hotels, Resorts, Country Clubs, Golf Courses & Gated Communities
- Manufacturing
- Marine
- Professional Services
- Real Estate
- Retail
- Technology
- Transportation & Logistics
- Wholesale & Distribution

COMPANY

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