

Your dedicated support team



Lean on our expertise to address more of your clients' insurance and risk management needs.



Shelley Balik, CLU®
Regional Director
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shelley_balik@concoursefinancial.com

Work closely with me to identify ways to move your business forward through:

- Solutions tailored to your clients
- Service unmatched by large firms
- Support designed for your practice



Internal Life Consultant
Janet Warren, ACS
205-268-3713
janet.warren@concoursefinancial.com

Connect for:

- Pre-sale support
- Proposals for life insurance
- Carrier recommendations and applications



Marketing Underwriters
Wendy Arther, FLMI, AALU, AIAA, ACS
513-362-1501
underwriting@concoursefinancial.com

Connect for:

- Pre-sale support
- Impaired risk evaluation

Detailed summary of competitive products



Life Case Manager
Terri Waremburg
205-268-5639
terri.waremburg@concoursefinancial.com

Connect for:

- Application management
- Underwriting and delivery requirements
- Status updates



Marketing Underwriters
Beth Phillips, ALMI, ACS
205-268-7511
underwriting@concoursefinancial.com

Connect for:

- Pre-sale support
- Impaired risk evaluation
- Detailed summary of competitive products



Disability Insurance Support
Carter Kowalski, DIA
952-641-5203
carter@securaconsultants.com

Connect for:

- Presale Support
- Quotes for income protection



Advanced Planning Support
Ronnie Hamilton, CFP, CLU®, ChFC®, AEP
205-268-5298
ronnie.hamilton@concoursefinancial.com

Connect for:

- Point-of-solution support
- Complex case design
- Executive benefits, wealth transfer and more

Contracting Support
contracting@concoursefinancial.com

Commission Support
leigh.pounds@concoursefinancial.com

New Business/PHS
insurancenewbusiness@concoursefinancial.com



Home Office: 800-876-3950 Send all applications to: insurancenewbusiness@concoursefinancial.com
Send overnight business to: 2801 HWY 280 S, Birmingham, AL 35223

 Connect with us for support every step of the way.



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