

W2 Independence

You will have complete ownership of your book of business, and our national client will put it in writing. This grants you the ability to monetize your book of business when the time is right.

- Transition deals typically range from 100% to 150% of T12, with this range assuming a T12 of \$400,000 or more.
- Grid payouts ranging from 50 -70%
- All your overhead costs, including assistant, rent, and technology, are fully covered.
- Maintain W2 employee status.
- Access to comprehensive health benefits
- No growth targets, small household policies, or length of service requirements.
- Succession planning opportunities and consulting.
- If interested, you can work from home. This typically requires a T12 of \$400,000 or more.

With over 20 current locations and over 15 planned openings in the next 6 months, our client has ambitious expansion plans. Over the course of the next 24 months, they intend to establish a presence in all major markets across the country. This strategic expansion reflects their commitment to broadening their reach and serving clients in key financial hubs.

Call or email for more details.

Experienced. Discreet. Independent.