

OSLI™

Outsourced Solutions for Life Insurance

Colton Groome Insurance Advisors provide customizable insurance solutions for wealth and trust professionals. CGIA understands our role as your collaborative and comprehensive insurance professional. Whether an RIA, bank, or family office, Colton Groome's OSLI™ partners are confident in their client's insurance portfolios, designed specifically to meet their goals. Because when financial plans, investment portfolios, and insurance design align, your client's possibilities are endless.

AS A TRUSTED PARTNER, YOUR CGIA TEAM IS:



PROVEN & TRUST-WORTHY:

These are your most important clients. We get it. Our role is to be your collaborative partner.



CREDENTIALLED & TEAM-BASED

Everyone needs to work as a unit. Our expert team is humble, confident, and ready to serve.



CLIENT-FOCUSED:

The CGIA team is salary-based, so your client won't feel typical sales pressure and tactics.



TAILOR-MADE:

Large enough for streamlined processes and best-in-class design. Small enough to understand one-size doesn't fit all in client long-term success.



DEDICATED TO SERVICE:

Each policy placed through CGIA will be monitored by LifeTrust3D™ on an annual basis for ongoing support.

MEET YOUR
outsourced team



**COLTON GROOME
INSURANCE ADVISORS**

Our Team



**COLTON GROOME
INSURANCE ADVISORS**



G. TATE GROOME,
CFP®, CLU®, AEP®



TOM LOVE,
CLU®, FLMI
Director of Insurance



AMY GILLEN,
Manager of Insurance Services



TAYLOR BELL,
CFP®
CCO & COO



LAURA GREENE,
Insurance Services Specialist

With more than 75 years of combined, insurance-specific experience, our highly credentialed team is vetted by some of the nation's top financial institutions, family offices and RIA firms. CGIA is a proven partner in both implementing and servicing high-level insurance portfolios, frequently spanning across multiple generations. Being independent means we aren't tied to a single insurance carrier. Instead, we leverage our carrier relationships to provide your clients with solid insurance design, optimizing vital elements like: carrier financial standing, contractual guarantees, underwriting, flexibility, and pricing.

**CREATE A PARTNERSHIP YOU CAN RELY ON, WITH OSLI™,
POWERED BY COLTON GROOME.**

LIFETRUST3D™ IS A SEPARATE ENTITY FROM VALMARK SECURITIES, INC. & COLTON GROOME INSURANCE ADVISORS.

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