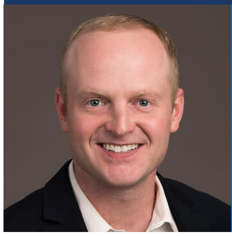

DPL Member Profile:
Tyler Peterson, CFA®
Runey & Associates Wealth Management

AUM: $50–100M
Type: Independent RIA

dpl MEMBER

Integrating insurance solutions in retirement planning

As a fiduciary, fee-only firm specializing in retirement planning, Charleston-based Runey & Associates sets a high bar for the firm — deliver exceptional, personalized service that meets clients' unique needs through proper planning.

But the firm faced a dilemma. While they offered financial planning and advice that often included insurance, Runey & Associates didn't have a way to deliver insurance solutions directly. Making insurance recommendations without being able to fulfill the policies in a fiduciary manner was proving to be a challenge. The firm needed a partner to bridge the gap between advisory services and insurance fulfillment.

Discovering DPL Financial Partners

DPL's insurance expertise and wide range of best-in-class solutions — from life, to disability, to long-term care — solved Runey & Associates' insurance problem. With DPL's support, the firm could not only advise clients on insurance but also ensure a seamless process for evaluating, selecting, and issuing those policies.

"DPL made the process so much easier," said financial advisor Tyler Peterson. "We're able to offer our clients a high-level overview of how it works and how much we anticipate it will cost, and DPL takes it from there."

Tailored solutions for specific needs

With DPL's assistance, Runey & Associates are able to tailor insurance solutions to each client's unique requirements using modern products and strategies. Like the hybrid product used for one client, effectively blending whole life insurance with a long-term care rider. This innovative approach provided the client with both long-term care coverage and the assurance that their investment would be utilized even if they didn't require such care.

Empowered financial planning

The partnership with DPL not only streamlined the insurance fulfillment process but also empowered Runey & Associates to focus on their core strengths — retirement planning and relationship building with their clients. With DPL, Runey advisors could spend more time understanding their clients' goals and creating comprehensive, personalized plans to meet them without the administrative burden of managing all the insurance paperwork.

"Anytime we have questions on insurance or annuities, we go to DPL. They add a lot of value to us and — more importantly — our clients. It's like they're part of our team."

– Tyler Peterson, DPL Member

Why DPL?

DPL's insurance and annuity marketplace can help RIAs protect client assets and generate tax-free income using our expanded insurance solutions — including best-in-class life, disability and long-term care from the nation's leading carriers.

Learn more at dplfp.com or contact us at 877.625.5544.

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