

## **Financial Planning**

Age Requirements

18 and over

Family

No

Intake Contact Email

steve.purdy@innovativeinsure.com

Intake Process

Call the office

Innovative Insurance Solutions, Ltd.

<http://www.innovativeinsure.com>

Main

(434) 979-7588

90 Whitewood Rd., Ste. 1

22901 VA

United States

Fee Structure

Fee Range

Payment Method(s)

Private Pay

Languages Spoken

English

Innovative Insurance Solutions offers personal insurance and financial tools backed by an A.M. Best A+ rated and Standard & Poor's AA rated company:

- 401k, IRAs, annuities
- Pensions, mutual funds, profit-sharing
- Long term care insurance

- Health insurance
- Disability Insurance
- Life Insurance (Whole, Term, Universal)

IIS founder Steve Purdy has more than 20 years experience planning successful estates and worry-free retirements:

- Certified, Long Term Care (CLTC)
- Chartered Financial Consultant (ChFC®)
- Chartered Life Underwriter (CLU®)
- Licensed Insurance Broker (LTC, Life, Health, Property and Casualty)
- Licensed Securities Representative
- Honor Roll, Million Dollar Roundtable (MDRT)

Service Area(s)

Albemarle County

,

Charlottesville City

,

Fluvanna County

,

Greene County

,

Louisa County

,

Nelson County

Email

[Steve.Purdy@InnovativeInsure.com](mailto:Steve.Purdy@InnovativeInsure.com)