



Don't take *our* word for it...

Providing a wealth of resources to financial advisors

Chartis enables you to provide specialized high net worth insurance solutions to your clients—something your competition can't do. Hear what advisors are saying about partnering with our Private Client Group:

“ I am very pleased with the service I have received from the independent insurance broker Private Client Group provided. I bound insurance for my own home several months ago specifically because of the services offered by the Wildfire Protection Unit® in California. Several of my clients have also been rewarded with improved personal insurance programs by working with professionals in high net worth insurance who set clear and professional expectations. The affiliation with Private Client Group has increased customer loyalty in our practice.”

– Bill Upson, CLU, ChFC
Strategic Assets, Walnut Creek, CA
Royal Alliance Associates

“ A trusted advisor having a relationship with the Private Client Group can offer their clients one of the most impressive personal lines policies in the industry: Auto, Home, Umbrella, Yacht and more—all on one bill. My clients are so pleased that I recommended Private Client Group to them that I am now receiving referrals for people living in one million dollar homes and upwards. It's only a matter of time before they begin showing me their investments!”

– Michael Chernoff
IAT dba Insurance & Trust, Tampa, FL
FSC Securities Corporation

“ Teaming up with Private Client Group has afforded me with business opportunities and additional business channels that weren't previously within my reach. I have since referred several of my key clients and colleagues to Private Client Group and have even transferred my own personal insurance portfolio to you. I have happily discovered that you are equipped to handle my complex insurance needs and have resolved some issues that my previous insurer could not.”

– Michael S. Cullen, CFP
Cullen Financial Advisors, San Francisco, CA
SagePoint Financial