

IZALE Financial Group ~ Client Success Story

"We have had BOLI for 25+ years at the State Bank of Toulon. I have been directly involved for the last 10 of those years having it in my benefit plan. Since meeting with Phil Aderton of IZALE Financial Group, I have talked more to IZALE representatives than our previous BOLI provider. Why? Because our previous provider made most of their information self-service, i.e. available on their web portal but not from an actual live person. To work with the IZALE team – Phil, Scott and Jeff – is like working with people right here in my office. Phil even comes to my bank to see me!

Scott Richardson presented at our board meeting and modified the design of our original BOLI program. We did not fully know, or completely understand, before IZALE the true advantages of BOLI. The IZALE Team spent time explaining what we purchased so it gave us confidence that what we got was right for us. Personally, I better understand my benefit plan. Even better yet, my executive staff fully understands what they have too!

What stood out the most for me was that IZALE provided an executive benefit plan that gave us the ability to meet both our short term and long term goals. Giving our bank additional leverage we did not previously realize we could have was enlightening. BOLI was something in the old days thought of as a way to pay for the replacement of the executive, like "key man insurance." Today it has expanded to serve our bank as an incentive for employee retention. My values that lead me as a community banker is to serve my community which includes my up and coming leaders of our institution. I want them to stay in the community and at the bank, and by staying, be rewarded!" Call me to hear more about IZALE 309-286-2861. ~ DOUG PARROTT, PRESIDENT/CEO, STATE BANK OF TOULON



Value People. Improve Earnings. Protect Assets.

855-492-5334

www.IZALEfg.com

Contact IZALE to write your success story today!

- Executive Benefits • BOLI–Bank/Business Owned Life Insurance
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- Supplemental Life, Disability, and Long Term Care Plans
- Fee Income Strategies • Lending Solutions

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