

ELIZABETH ANNE LEY

TRANSAMERICA®
AGENCY NETWORK

"She Will Always Do the Right Thing for You"

Elizabeth is an advisor specializing in health, life, and long-term care solutions. She has created her business with her client's best interests at heart. She uses a holistic approach to planning. She will develop a lifetime income using tax-diversified strategies. For companies, planning cannot just be at the end. Her understanding of the changing landscape and advanced planning tools gives her clients the advantage they need to be in control in a turbulent time.

Her knowledge of taxes and insurance, including Medicare, will strike you immediately when speaking with Elizabeth. She started in public accounting and is an active CPA who earned a master's degree in tax from RMU. A multi-million-dollar insurance producer, she is a qualifying member of the Million Dollar Round Table®. With her financial experience, she will act as a fiduciary in the client's best interest.

What does all this mean to you?

Elizabeth is a valuable resource and asset for you or your company. A non-traditional advisor, Elizabeth's clients enjoy the benefits of working together with an individual who is well versed on the tax laws and regulations involved in financial planning and insurance.... and how all of these play a role in your retirement, an active business, or in the selling of your business. That is a rare combination. She is known for finding creative ways to accomplish your goals.

A sought-after speaker on business planning, insurance, Medicare, and social security topics, Elizabeth will soon teach financial literacy in coordination with Junior Achievement. Her volunteer efforts in the community are widespread. The trust her clients have in her abilities is simply unparalleled.

Transamerica Agency Network is located at
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Elizabeth.Ley@tfaconnect.com or ELey9096@gmail.com.
She is happy to meet with you for a no-obligation review.

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