



Robert Plank 

Question: What is Jan Levine's background and current role?

Title: Financial Planning with Jan Levine: Career, Experience, and Expertise

Jan Levine has a long and diverse career in financial services and information technology. He began in the financial sector in the 1980s with the predecessor of Ameriprise, Investors Diversified Services. Over the years, he has also worked extensively in IT, both in hardware and software. Currently, he is a financial professional and an insurance sales representative with Bankers Life, a company specializing in retirement planning. His focus is on helping individuals protect their assets, navigate Medicare and long-term care, and convert retirement savings into guaranteed income using his proprietary Legacy Income System. He operates out of the Charlotte, NC office with the majority of his activity in the Myrtle Beach area.

Question: What is Jan Levine's approach to financial planning?

Title: Jan Levine's Holistic Approach to Retirement and Asset Protection

Jan Levine takes a comprehensive and personalized approach to financial planning, focusing primarily on individuals aged 55 and older. His services include:

- Helping clients set up Medicare correctly.
- Assisting with long-term care planning, an often-overlooked aspect of financial security.
- Protecting retirement savings from stock market volatility by converting assets into guaranteed income.
- Conducting in-person consultations to build trust and provide tailored solutions.
- Offering a one-stop-shop for retirement planning with a team of specialists covering different financial aspects.

He emphasizes personal connections, often meeting clients face-to-face at their kitchen tables to build strong, trust-based relationships.

Question: How does Jan address people's fears about retirement and financial planning?

Title: Overcoming Financial Anxiety: Jan Levine's Strategy for a Secure Future

Many people hesitate to plan for retirement because they fear aging, financial loss, or simply don't know where to start. Jan acknowledges these fears and alleviates them by:

- Providing clear, easy-to-understand solutions.
- Offering one-on-one consultations to address specific concerns.
- Emphasizing that financial planning is not just about money but about securing a fulfilling and worry-free future.
- Highlighting the risks of waiting too long to plan, especially as time and market conditions change.
- Reassuring clients that his process is designed to protect them, not pressure them into decisions.

Question: What financial solutions does Jan offer, and who are they for?

Title: Financial Security for Retirement: Jan Levine's Investment Strategies

Jan specializes in financial solutions for individuals 55 and older, particularly those in or near retirement. His services include:

- **In-Service Rollovers:** A little-known option allowing people, 59 ½+, to move their retirement savings from a 401(k) or other qualified investment accounts into a safer vehicle without a taxable event.
- **Indexed Annuities:** A financial product that guarantees income while protecting against market downturns. These annuities:
 - Reset annually.
 - Offer returns currently just under 8%.
 - Never lose value, even when the stock market declines.
 - Provide a safe, steady income for retirees.
- **Holistic Financial Planning:** Including Medicare guidance, long-term care options, and life insurance to ensure clients are fully covered in all aspects of retirement.

Jan's approach ensures clients have financial stability and peace of mind as they transition into their later years.

Question: What is Jan's number one piece of financial advice?

Title: Jan Levine's #1 Financial Tip: Stay Informed and Proactive

Jan's top financial advice is simple but crucial: **Stay aware and proactive.**

- Regularly review your financial situation, market conditions, and personal goals.
- Adapt to changing circumstances, whether economic shifts or health-related needs.
- Don't assume that past strategies will always work—reevaluate as needed.
- Work with a financial professional to ensure you're making informed decisions.

Ignoring finances can lead to unexpected hardships, but staying engaged helps ensure long-term security.

Question: How can people contact Jan to start planning their financial future?

Title: How to Contact Jan Levine for Retirement Planning and Asset Protection

Anyone interested in financial planning, retirement strategies, or asset protection can reach Jan Levine through the following methods:

- **Email:** jan.levine@bankerslife.com
- **LinkedIn:** linkedin.com/in/janmlevine

Jan offers a no-obligation consultation to assess financial needs and discuss potential solutions. His approach is trust-based, ensuring clients feel confident and comfortable with their financial decisions.

Question: What is Jan Levine's personal philosophy on trust and success?

Title: The Trust Balloon: Jan Levine's Philosophy on Integrity and Relationships

Jan describes trust as a **party balloon**:

- When it's new, it's flat and lifeless.
- You must invest time and energy to inflate it and make it valuable.
- Once inflated, even the smallest pinprick WILL deflate it..... making it impossible to restore.

This philosophy emphasizes that trust must be earned, maintained, and protected.

Jan builds relationships with integrity and ensures that clients feel confident in his guidance.

If you're looking for financial security in retirement, reach out to Jan Levine at jan.levine@bankerslife.com

or find him on LinkedIn at [linkedin.com/in/janmlevine](https://www.linkedin.com/in/janmlevine).

Jan can also be reached on his cell at 704.668.7922