



PREMIER CLIENT SOLUTIONS™



ALEXANDER EDDY INSURANCE & FINANCIAL SERVICES

WHO WE ARE

Our organization consists of highly motivated and dedicated insurance professionals who are passionate about serving our clients, developing careers, and giving back to our communities.

FOUNDATION

Alexander Eddy started his career in the insurance industry in 1979. Since then, AEIFS, Inc., has grown into a Premier Client Solutions™ agency.

OUR MISSION

Helping you to protect your property and your business by respecting and valuing our Clients.

OUR MANTRA

INTEGRITY
PASSION
INNOVATION

THE DIFFERENCE

We take pride in our technical abilities, our resources and past performance that has earned us the trust of many high net worth clients.



CHOICE

We have strong relationships with a broad range of standard and non-standard markets that enable us to pattern each client’s needs to the best products available.

OBJECTIVE

As a privately owned company our focus is not on the quarterly return but on the needs of our clients.

GOAL

Our goal is to provide you with the most dedicated service at the most effective cost.

LIAISON

We work closely with your team of professionals including Home Offices, Wealth Managers, Trust Companies, Escrow Officers, Real Estate Brokers, Financial Planners, Accountants and Attorneys to protect your interests.

OUR COMPANIES



insured.™

Authorized to offer



Auto Insurance Program from



CSE Insurance Group

— Since 1949 —



HAGERTY®



KEMPER
PREFERRED



MAPFRE
INSURANCE



MERCURY
INSURANCE



Insurance™



Member of Liberty Mutual Group



TRAVELERS 



Trusted Choice®
INDEPENDENT INSURANCE AGENTS



OUR APPROACH

AEIFS Premier Client Solutions™ is designed to offer a concierge type service to individuals and families with significant means and demanding schedules. Our Premier Client segment is comprised of highly skilled professionals who have access to a suite of sophisticated tools, products and resources.



AWARENESS

We are aware that high net worth clients have worked tirelessly to acquire assets that they rely on for comfort, pleasure and continued success. They seek and hire professionals who share their passion and vision for protecting these assets by managing risk.



WHAT WE DO

PHASE ONE DISCOVERY

We have developed assessment tools to uncover High Risk components of a portfolio of properties, automobiles, fine art, Jewelry, wine, aircraft, luxury yachts, horses, ranches and farms.

PHASE TWO DISCOVERY

If phase one demonstrates a need for in depth analysis of the risk profile, we will initiate a second phase of discovery with focus on high impact components of the profile.



ANSWERS

Protecting High Value Assets requires a customized risk management process. We create programs that include learning tools, risk transfer techniques and insurance coverage from highly regarded insurers.



PROPERTY RISK

Premier Client approach focuses on protecting high-value homes which may be located in multiple states or foreign countries, luxury and classic automobiles, antiques, collections (fine art- jewelry-wine), yachts, farms and vineyards.



LIABILITY RISK

Liability risks are a major threat to high net worth individuals and families. We can help protect persons in the entertainment and publishing industries as well as those serving on Board of Directors who are facing high impact personal liability risks.



TRAVEL & KIDNAP RISK

The world has become increasingly dangerous to navigate. We can help protect against sickness and accident while abroad as well as risk of kidnap and ransom while traveling.



WEALTH PRESERVATION & WEALTH TRANSFER RISK

We work with high net worth clients’ legal and accounting professionals to provide tax efficient insurance products as well as long term care products to preserve wealth for current enjoyment and efficient transfer to future generations.



AEIFS Premier Client Solutions™

Personal Property, Liability, Life Insurance and Long Term Care 800-887-1070 | www.aeifs.com

The information we provided in this publication is only a general overview of subjects covered, and is not intended to be taken as advice regarding any individual situation, and should not be relied upon as such. You should consult your legal and financial advisors regarding specific coverage issues. All insurance coverage is subject to terms, conditions, and exclusions of the applicable policies. The information does not constitute acceptance of a risk or an agreement to insure, and it does not create any obligation of any kind, contractual or otherwise. AEIFS cannot provide any assurance that insurance can be obtained for any particular client or for any particular risk.

AEIFS is not authorized to provide legal advice. Statements concerning legal matters should be understood as general in nature based solely on our experience as insurance brokers and risk consultants and should not be relied upon as legal advice. You should review all such matters with your own qualified legal advisors.

© AEIFS, Inc.
All rights reserved
CA License No. 0E16970



Alexander Eddy Insurance & Financial Services
800-887-1070 | info@aeddy.com