



**AIA**  
Virginia

AIA Virginia is pleased to announce a new partnership with Chartwell Capital Advisors. Rob Smith and his team are ready to provide individual consulting services to assess your benefit needs in each of the disciplines listed below and find the best products and services to meet those needs. These services are available exclusively to AIA Virginia members to meet your needs as a business, individual, or employee with no obligation to buy.

## **BENEFITS PLAN PRODUCTS AND SERVICES**

### **Financial Planning Services**

Chartwell Capital Advisors will meet with you to discuss your financial security goals and offer strategies for meeting them. Once a plan is crystalized, Chartwell will work with you to execute it by offering an array of financial products: investments, life insurance, annuities, long-term care, income protection, retirement plans, group benefits and more.

### **Legal Services | AIA Virginia Help Line:**

Any member can call and get up to 15 minutes of free consulting services on legal matters related to business or personal estate planning. If legal services are needed, discounted pricing is available exclusively for AIA Virginia members. Services include contracts, design and construction law, estate planning, business formation, business succession and more.

### **Health Insurance**

The Chartwell team can provide a holistic health insurance evaluation and prepare a recommendation for the best health care plan. Since Chartwell doesn't represent just one carrier, they will identify each participant's needs and provide personalized individual, business, group and health exchange services.

### **Commercial and Personal Lines Insurance**

Chartwell can price and evaluate commercial insurance for business members including an "AIA Virginia Small Firm Package" (professional liability, workers comp, BOP, bonding, umbrella). Homeowners, auto, umbrella and more personal lines are also available as needed.

### **Ancillary Benefits**

Chartwell can connect members with providers for: dental, vision, tele-doc, wellness, supplemental, accident, pharmacy, pet, hospitalization and other specialized benefits.

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