



CAPABILITY STATEMENT

Your Partner in Secure Retirement Planning

COMPANY OVERVIEW

Addison Clayton Funding LLC is a certified minority business where your financial security is our top priority. With over 14 years of experience as a licensed insurance professional, we have been dedicated to helping individuals and families plan for a comfortable and secure retirement. Our expertise is backed by a Chartered Retirement Planning Counselor (CRPC) certificate, ensuring that you receive knowledgeable and reliable guidance.

CORE COMPETENCIES

- ▶ Retirement Planning
- ▶ Life Insurance
- ▶ Medicare and Health Insurance Enrollment
- ▶ Financial Administrative Assistant and Consultation

DIFFERENTIATORS

- ▶ **Experience:** With 14 years of experience, we bring a wealth of knowledge and expertise to your financial planning.
- ▶ **Certified Professional:** Our Chartered Retirement Planning Counselor (CRPC) certificate assures you of our commitment to excellence.
- ▶ **Personalized Service:** We take the time to understand your unique financial situation and goals, offering customized solutions.
- ▶ **Funding:** We help our clients find funding via grants or loans

PAST PERFORMANCE

Benefits Coordinator, Group term policies for various day care centers, Medicare & Affordable Care Act clients, individual annuities and IULs.

CERTIFICATIONS

- ▶ FL 215 license
- ▶ CRPC (Chartered Retirement Planning Counselor)
- ▶ Diversity Equity & Inclusion
- ▶ CPM (Certified Public Manager)
- ▶ Notary
- ▶ MBE & SBE

COMPANY DATA

Addison Clayton Funding LLC

NAICS CODES

- 561410 - Resume writing
- 923130 - Admin of Human Resource Programs
- 541199 - Notary Public Services
- 611430 - Continuing Education Seminars or conferences
- 523910 - Individuals investing
- 524210 - Life Insurance Agencies
- 524114 - Health Insurance Carrier
- 523940 - Investment advice

Contact Information

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