

**LEWIS & PALMER**

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**BENEFITS**

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FINANCIAL SOLUTIONS GROUP

## Who are we?

## Team



RENEE LEWIS  
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TED PALMER  
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## Services

## Business

- Group Benefits
- Workplace Benefits
- 401k, Simple and SEP IRA's
- Online Enrollment
- ACA Compliance
- Payroll and HRIS
- Electronic Onboarding
- Employee Financial Education
- Section 125 Admin
- Cobra Admin

## Individuals

- Life and Disability Insurance
- Retirement Planning
- Traditional and Roth IRA's
- 529/ Education Planning
- Wealth Management Services
- Business Continuation Planning
- Key Person Coverage
- Executive Bonus
- Deferred Comp
- Long Term Care Insurance

## Why us?



**Renee Lewis**, Founded the firm having spent 20 years as a successful entrepreneur. She brings an intimate knowledge of the challenges owning a business presents. Her passion lies in building successful financial and retirement plans.



**Ted Palmer**, a Financial Services Representative, has two decades of professional experience in banking, operations and small business consulting. As a leader he holds a philosophy that places employees and business owners as the primary customer for any enterprise.



**Together**, we have acquired people from various industries to help build solutions for their clients.



**We begin** with a frank conversation regarding your aspirations and desires.



**Once we know** your specific wants, we design a plan to provide benefit and forever manage cost VS real return.



**The plan** is tailored to you and your business. It is fluid and we become your resource in building a great business, with a remarkable team.



“That which happens to you, is never as great as that which can happen for you...”

**Ted Palmer**

## Clients Testimonials



"As a small business owner, I wear many hats; accounting, sales, human resources, etc. Having LP Benefits help me make decisions on employee benefits and many other business needs has allowed me focus on what I do best for my business while you guys do what you do best for ours. LP Benefits has helped put together group insurance for my team and other systems in place that have saved me hours researching different options unnecessarily. I love my LP Benefits team!"

**Armando Binelo Trust Technology Solutions**



"Being a small company and not knowing what products to purchase for our employees, Lewis and Palmer made it very simple. I love being able to speak to a real person directly on the phone instead of some online company based who knows where."

**Lisa C. Fire Ranger**



"Lewis & Palmer has simplified my life at Trumeter. Renee and Ted still believe in personalized service and their scope of knowledge of the industry is broad which is tough to find these days. As a small business with employees in multiple states they've streamlined our employee benefit plans. I have such faith in Renee & Ted and their integrity that I trust them implicitly with all our business needs."

**Regina D. Trumeter**

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