



**Dara E. McMillan**  
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Registered Representative

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### BUSINESS PHILOSOPHY

My mission is to provide directions for my clients in the area of insurance and investments. It is my goal is to help my clients achieve financial security which helps give them peace of mind so they can focus on other areas of their life. I have built relationships for 32 years which are based on trust, integrity, continual communication, prompt personal service and competent financial advice. I look forward to working with you in helping you obtain financial freedom.

### INVESTMENT & RETIREMENT SERVICES

- Comprehensive Financial Analysis
- Wealth Accumulation Strategies
- Wealth Distribution Strategies
- Annuities (Fixed & Variable)
- Traditional and Roth IRAs
- Pension Payout Alternatives
- General Securities
- Asset Allocation Services
- Mutual Funds

### ESTATE SERVICES

- Estate Conservation Strategies
- Second to Die (Estate Saver) Life Insurance
- Grandchild Education Funding
- Charitable Giving Strategies

### HOW WE HELP PEOPLE

- Income Protection Strategies
- Retirement Income Protection Strategies
- Legacy Planning
- College Funding
- Disability Income Insurance
- Term Life Insurance
- Whole Life Insurance
- Variable Universal Life Insurance
- Long Term Care Insurance

### PRODUCTS AND SERVICES

- Personal Financial Needs Analysis
- Business Owner Services
  - \* Business Needs Analysis
  - \* Business Succession
  - \* Qualified & Non-Qualified Executive Benefits
  - \* Key-Person Insurance
  - \* Executive Bonus Agreement
  - \* Deferred Compensations Arrangements
  - \* Buy/Sell Agreement Funding
- Employee Benefit Plans
- Group Life Insurance
- Group Health & Dental Insurance
- Group Disability Income Insurance
- Voluntary Permanent Life Insurance
- Payroll Deduction Plans
- Retirement Plans
- 401(k) Plans

### PERSONAL

- Licensed to sell Life Insurance in NC, SC, MD, NH, VA, FL
- Registered to offer securities in NC, CA, KY, MA, VA, NH, FL
- Licensed to sell Long-Term Care Insurance in NC
- 32 years in Financial Services Industry
- BAS in Business Management Mount Olive College
- USAF veteran