

Business Check-Up

Your Path to Success:
Navigating the Future with Precision



HTA
insurance services

1

15-Minute Discovery Call

We begin with a quick call to review the process, ask a few questions to determine if our service is a good fit, and answer any questions.

Expert Advice. Zero Pressure.
Ask a Salaried Advisor!

2

Share Your Key Documents

Send us your insurance declaration pages. Our experts will review your coverage, identify gaps, and ensure your policies align with your business needs for complete peace of mind.

3

Your Personalized Insurance Check-Up

We create a clear report, highlighting coverage gaps, and key details to ensure you make informed decisions.

Keep Your Business Protected

Whether you keep your current plan or make adjustments, you'll have confidence knowing your coverage is working for you.

5

Ongoing Support at No Cost

We offer free ongoing monitoring. Just grant us Agent-Servicing Permission to advocate for you and keep your coverage optimized.

No-Cost
Guidance



WHY HTA?

True Advocacy Over Sales

Our advisors are **salaried**—not commission-based—so your needs always come first.

Choice & Value

With access to **over 20 leading** insurance companies, HTA offers you more choices to match your goals and your budget.

Advocates for Small Business

Providing **strategic guidance** and **tailored protection** to meet the unique needs of small businesses.

Your Trusted Partner for the Long Haul

Ongoing, Unlimited assistance after enrollment, including annual reviews to keep your coverage current and working for you.