



COMPANY PROFILE

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About us

An insurance and financial consultancy firm dedicated to promoting the culture, knowledge, and best practices related to policy and portfolio management, human asset development, and client support.

At Legacy Builders, we stand fast next to three main values: Objectivity, Passion, and Achievement. We believe that these values drive us to provide our clients with top-notch organization, meticulous follow-up, and outstanding customer service, all while demonstrating a commitment to the MDRT Code of Ethics.

OUR MISSION

TO PROVIDE FINANCIAL SECURITY
ADVISORY SERVICES AND OFFER OUR
CLIENTS PEACE OF MIND THAT IN
RETURN ENABLES THEM TO LIVE
WITH DIGNITY AND LEAVE A LEGACY
BEHIND.

OUR VISION

BECOMING ONE OF THE LEADING
INSURANCE AND FINANCIAL
ADVISORY FIRMS IN LEBANON AND
THE REGION TO BE ABLE TO SERVE
POSITIVE PEOPLE AND COMPANIES
BY PROTECTING THEIR INCOME
AND BELONGINGS TO ACHIEVE A
SECURE AND HEALTHY FUTURE.

Our Mission and Vision



40,000+

Consulting hours, demonstrating our extensive expertise and dedication to serving our clients.

3,000+

Impacted Lives, encompassing a wide range of needs and requirements

900+

Clients have experienced the positive impact of our services.

24+

Of **valuable experience**, allowing us to provide exceptional services and solutions.

Our Milestones

Our Team



Naji A. Haddad

Financial Planner
Legacy Builders & BLIS Founder



**Sabine Rouhana
Haddad**

Operations Manager



**Marie-Noël
El-Khoury**

Assistant Portfolio Management
Social Media Coordinator



Charbel Abboud

Operations Coordinator
Digital Marketer

Our Services

 **Personal solutions**

 **Corporate solutions**

 **Agent solutions**

 **Wealth solutions**

Personal solutions

We understand that everyone's financial goals are unique
And that's why we offer Personal Solutions that are tailored to your individual needs.



1

Life Insurance

Protect loved ones
with the right
coverage and expert
guidance



2

Retirement Planning

Secure your financial
future with
personalized
retirement plans.



3

Education Planning

Achieve your child's
educational with
tailored financial
strategies.



4

Critical Illness

Financial protection
against unexpected
medical expenses.



5

Saving for a goal

Customized plans to
secure your financial
aspirations.



6

Income replacement

Maintain financial
security during
disability with a
personalized plan.

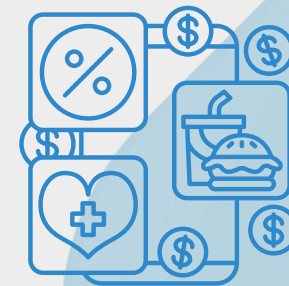
Corporate solutions

Running a successful business requires careful planning and execution. That's why our Corporate Solutions services are designed to help you achieve your financial goals and navigate the complexities of business ownership.



SUCCESSION PLANNING

Preserve your business legacy and secure your family's financial future with our expert advisors' help in creating a comprehensive succession plan.



EMPLOYEE BENEFITS

Enhance employee satisfaction and retention by creating a competitive and cost-effective benefits package tailored to meet the unique needs of your workforce.



PARTNERSHIP SOLUTIONS

Build a strong and successful partnership by navigating the complexities of partnership agreements, ownership structures, and other crucial considerations with the guidance of our expert advisors.



RETAIN KEY PEOPLE

Keep your top talent engaged and committed to your organization through customized plans that recognize and reward their contributions.

Agent Solutions

Our Agent Solutions service is designed to provide insurance agents with the tools they need to succeed in the industry. From organizational skills to mentorship and sales development, we offer a range of solutions that can help agents achieve their goals.

Organivity©

Boost agent productivity by helping them be organized and active.

Positivity

Foster a positive mindset for agent success in the insurance industry.

Productivity

Empower agents with advanced tools and technologies for enhanced efficiency

Mentorship

Personalized coaching and support to help agents reach their full potential.

Development / EXPAND

Sales development program for insurance companies, including recruitment, training academies and system upgrades

BLIS Experience

Annual event connecting agents with industry leaders for insights and networking opportunities.

Wealth solutions

We understand that building and preserving wealth is essential for achieving your financial goals. We offer a range of solutions to help you protect your assets, accumulate more wealth, and manage your investment portfolio to optimize performance.

Wealth Accumulation

Tailored long-term investment planning to grow wealth, hedge against inflation, and meet your financial goals.

Wealth Analysis

Annual assessment of your financial status to gain insights and identify growth opportunities.

Wealth Protection

Safeguard your hard-earned assets and ensure financial security with our comprehensive service.

Wealth Management

Optimize your investment portfolio and receive expert recommendations for managing and maximizing your wealth.

Contact Us



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