



AUSTIN
BENEFITS
AUDIT

Referral Partner One-Pager

A private benefits gap review resource for clients with income to protect.

Your clients may have benefits through work, but they may not know what those benefits actually protect. Austin Benefits Audit gives them a private, plain-English way to review disability income, life, and health coverage gaps before they need the coverage.

BEST REFERRAL FITS

- Tech professionals, sales leaders, executives, and managers
- Physicians, healthcare professionals, and clinical leaders
- Consultants, business owners, and self-employed professionals
- High-income families with mortgage, debt, childcare, or income dependence

COMMON GAPS WE HELP REVIEW

- Employer LTD percentage, taxability, and monthly caps
- Waiting periods and household cash-flow exposure
- Bonus, commission, RSU, consulting, and self-employment income
- Employer life insurance amount, portability, and adequacy

WHY PARTNERS REFER

- Value-first review rather than a generic insurance quote
- Private process: no employer contact and no obligation
- Plain-English education clients can actually understand
- A practical resource for clients who may be under-protected

SIMPLE REFERRAL PROCESS

- Send a warm intro or share the DI Gap Scan link
- Client requests a complimentary private review
- We identify possible gaps and next-step questions
- If solutions are appropriate, we compare available options

COPY/PASTE REFERRAL LANGUAGE

I know Jesus Escamilla with Austin Benefits Audit. He helps professionals privately review potential gaps in disability income, life, and health coverage - especially around employer plan limits, monthly caps, waiting periods, taxes, and income that may not be fully protected. The initial review is complimentary, and your employer is not contacted.

Austin Benefits Audit

Led by Jesus Escamilla, Founder and Licensed Texas Insurance Agent
Private benefits reviews for Austin professionals. Life - Health - Disability Income.

AustinBenefitsAudit.com

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