Summa PLANNING GROUP | THE AUTISM VOYAGE

FOR FAMILIES WHOSE RESPONSIBILITIES MAY LAST A LIFETIME.

Because planning feels different when someone depends on you long-term.



INCOME PROTECTION | CARE CONTINUITY | FUTURE PLANNING

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Helping families and business owners protect income, address financial risks, and plan for continuity, especially when responsibilities may last a lifetime

Who We Serve

- Parents and caregivers planning for lifelong responsibilities
- Business owners and professionals managing family and business risks
- Families supporting children with long-term needs and aging parents

Planning Areas We Address

- Life Insurance with Living Benefits
- Long-Term Care Insurance & Funding Strategies
- Special Needs Continuity & Funding Strategies
- Business Succession & Buy-Sell Funding
- Insurance Planning Coordinated with Legal & Tax Professionals

> *For our families, the question was never just, "Where does the money go?" It was: "Who steps in? Who knows? Who is ready?"*



Michael Pereira, MBA, CEPA®

Founder, The Autism Voyage® & Summa Planning Group, LLC

The greater the responsibility, the greater the consequences of being unprepared."

Founder & Insurance Planning Specialist • Featured in EP Magazine & First Time Parent Magazine

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Schedule Your Complimentary Insurance Planning Review

An opportunity to review your existing insurance coverage, identify potential gaps, and explore how your protection strategies align with your family's long-term responsibilities.

SCAN TO SCHEDULE

Complimentary Review
No obligation

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