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Benefit firms recognize they too can seize neighboring business territory

High net worth planners have long known they could tap employee benefits revenue if they so chose, now employee benefits firms are realizing the reverse works as well.

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By Matthew Tuttle and Richard Urbealis

December 1, 2007

The financial services business used to be simple. If you wanted employee benefits programs you went to an employee benefits specialist. If you wanted stocks or mutual funds you went to a stockbroker. If you wanted insurance you went to an insurance agent. If you needed a will you went to an attorney, and if you needed your taxes done you went to an accountant.

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