

SPRING 2017

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FULL SERVICE INDEPENDENT INSURANCE AGENT

“TULIE” MARTINEZ

BRINGS POLICIES, PASSION AND LOVE TO HER CLIENTS

As Seen in...



POLICIES, PASSION & Love



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acing an uncertain future after moving to Florida following 15 years as a legal assistant in Southern California, G. “Tulie” Martinez was working in Leesburg, Florida when a customer showed her an ad for a position as an insurance agent for a captive insurance agency. Encouraged, she applied, got her license and started her insurance agent career in April 2004, out on a bottom rung, selling prescription drug discount plans.

After selling prescription discount plans and Medicare supplements for a year, she relocated to Ocala and then to Jacksonville, Florida and became a full-fledged agent. Within a few years, Tulie rose to become a Top Five insurance agent under her mentor, Jason G., the manager at the Jacksonville location, for four years in a row. In 2007, she launched her own firm TMC Insurance Services. By 2011, she left the captive agency and became a fully independent agent, and in 2015, she rebranded as Martinez & Associates.

In 2011, while struggling to be independent and at a time when she thought her career in insurance was over, she met a fellow insurance agent named Nestor Sala, Founder of Compass Group Insurance in Fernandina Beach, FL, who encouraged her to let go of her past failures and reassured her that there were many insurance companies she could affiliate herself with and remain independent. His belief and encouragement helped get her appointed with health and final expense insurance carriers, and the confidence he gave her cemented her desire to continue her career as an independent insurance agent.

The Guatemalan born agent, who came to the U.S. to find and live the proverbial American Dream, has long dedicated her “holistic” approach to insurance by addressing a multitude of needs. Among the aspects of someone’s complete financial picture that she tackles are 1) Health Insurance and Prescription Medication Costs; 2) Budget and Debt Management; 3) Remaining independent throughout retirement (LTC); 4) Avoiding taxes on wealth transfer (life insurance); and 5) Guaranteeing that they never run out of money (Fixed and Indexed Annuities).

G. “TULIE” MARTINEZ

The Renowned Retiree
Advocate, Who Regularly
Shares Her Financial Wisdom
On FirstCoast.tv, Helps People
Protect Their Savings From
Rising Healthcare Costs,
Taxation and Economic
Fluctuations.

As anyone who watches her hard hitting weekly informational “Retirement & You” segments on the online platform FirstCoast TV (Jorge Rivera) can attest, Martinez goes above and beyond on behalf of her clients. Driven by a passion for helping folks utilize insurance to fill their retirement gaps, she has become a widely recognized retiree advocate that helps people protect their savings from rising healthcare costs, taxation and economic fluctuations.

Tulie’s largely referral based clientele is comprised of people with unique financial needs that she is qualified to address. As an independent insurance agent, Tulie has access to a plethora of insurance companies and services so that she may address their individual needs.

Whether they’re losing money in their retirement accounts, are unable to afford the cost of their current prescription medications, Tulie is eager to sit down with new prospects and find ways to help them resolve their immediate problems. They’ll often hire her to help them find a plan that will cover their expensive prescription medications; reduce the cost of their health care; and educate them on the choices insurance companies offer to guarantee an income for life. Tulie also helps folks remain independent throughout their retirement while leveraging their assets to pay for the high costs of an unexpected Long Term Care event while leaving a tax-free legacy to their beneficiaries. This concept guarantees that folks never run out of money and their assets are safe from economic fluctuation.

Her other services include an annual check-up on their auto and homeowners insurance (a strategic alliance she has with Matt Moss, Moss Insurance Jacksonville Beach, Florida); assisting her clients to find adequate home health care (an alliance she has with Robin Van Duzen and Barbara Hayes with We Care Companions); assisting her clients to avoid Probate and Guardianship (an alliance she has built with Mike Jorgensen, Senior Counsel, Jacksonville, Florida); offering second opinions on their taxes (alliances made with various CPAs); and, offering a complimentary “second opinion on their financial outlook” (an alliance created with Faron Gallon, ChFC., CRPC., founder and coordinator of Ryourassetsprotected.com). All of these services are at no cost to the prospect.

Tulie’s love and compassion for people is equaled if not surpassed by her lifelong affinity for dogs. She is perhaps the only full service insurance agent in the U.S. whose passion to rescue and house canines has its own Facebook Page, The Guatemalan Doggie Mansion. It was formerly a two bedroom house which her father, San Juan, converted into a giant doggie mansion housing new and older dogs. The house now contains personalized comfy kennels, a huge yard with a doggie pool, lots of doggie toys, and keeps the inhabi-

tants safe, happy and full of healthy meals and natural treats. While financially supporting her mom, Victelia, and her dad, San Juan, that live in Melrose, FL, during their aging years, she wants to help everyone by educating them on events that change as we age, and assist them to prepare for their retirement. Tulie has a daughter, Krystal, and a grandson, Angel, that live in Gainesville, FL. They are all equally passionate about rescuing and caring for canines.

Tulie’s passion also comes from being brought up in hard times and watching her Grandmother run a small business in times when women were not permitted to be successful. Tulie’s Grandmother utilized what she was great at, cooking meals and helping strangers and neighbors during tough times. Her grandmother never turned anyone away when they needed help, she found a way to provide food, shelter and clothing to her 14 children and at the same time help as many people as she could.

“I know this may sound odd, but one of my goals in life is to be a philanthropist so that I can help out a lot more people and dogs throughout my life, without limits,” says Tulie. “Everything starts with my desire to make a difference and pass on my knowledge and expertise and help folks understand every aspect of their situation and how, with a few minor adjustments, they can live a ‘Fabulous Florida Retirement’ ”.

Tulie believes “The Sky is the Limit when you Believe You Can Make a Difference, One Person at a Time.”

She is an Approved Retirement Representative with National Life Group for the Clay County School District. Tulie volunteers at the Nassau Humane Society, the Clay County Humane Society, Rooterville Sanctuary, Feeding Northeast Florida and Jacksonville Beach Women’s Club. She networks with Compass Group Insurance, Elite Resource Team, Downtown Professional Network, and the Jacksonville Chamber of Commerce. She is also a consultant/mentor with insurance concepts for various independent agents. She is a former member of The River Club, The University Club, North Florida Senior Alliance, the Jacksonville Chamber of Commerce, the Jacksonville Professional Woman’s Council, the Melrose and Keystone Heights Woman’s Club. ☘

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Your FUTURE.

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