

LIFE SETTLEMENT INSURANCE DISCUSSION PROMPTS



A LIFE SETTLEMENT ALLOWS A POLICY OWNER TO SELL AN EXISTING LIFE INSURANCE POLICY

to a third party for an amount that may be greater than its surrender value but less than the policy's death benefit. For individuals who no longer need their coverage, a life settlement may provide an alternative to surrendering the policy and can create more liquidity than the surrender cash value.

Has your financial situation changed in a way that makes access to liquidity during your lifetime more important than maintaining a death benefit for your heirs?

Have you experienced a significant change in health that has created a need for additional liquidity from a life insurance policy that no longer fits your goals?

Instead of surrendering a policy, would you be interested in exploring options that may provide greater value than the policy's current surrender value?



DON'T LEAVE YOUR LEGACY TO CHANCE

Contact us to review your plan, identify potential gaps, and design solutions to help preserve your legacy for generations to come.

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