

LIFE INSURANCE TRUST INSURANCE DISCUSSION PROMPTS



TRUST-OWNED LIFE INSURANCE CAN PROVIDE GREATER CONTROL

over how and when proceeds are distributed to beneficiaries while helping streamline the administration of those assets. When properly structured and administered, a trust can also keep life insurance proceeds outside the insured's taxable estate and provide additional protection and flexibility for beneficiaries.

Do you want to structure your life insurance to ensure that the death benefit is excluded from your taxable estate?

Do you have grandchildren, nieces, or nephews for whom you would like to establish specific guidelines for how and when they receive life insurance proceeds?

Do you have a blended family and want greater control over how a death benefit is distributed to help ensure each child is provided for according to your wishes?



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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