

TAX-FREE INCOME INSURANCE DISCUSSION PROMPTS

CASH VALUE INSIDE A PERMANENT POLICY GROWS ON A TAX- DEFERRED BASIS

by a varying amount, depending on the policy design and performance. When properly structured and funded, these policies may provide a source of supplemental income in later years through withdrawals and policy loans. Because policy design, funding, and ongoing management can significantly affect the outcome, careful planning is essential to align the policy with long-term financial goals.



Do you routinely maximize your contributions to retirement accounts on an annual basis?

Do you have a family history of needing long-term care services? Are you interested in exploring a way to pre-pay those costs with life insurance?

If you're using life insurance to supplement your retirement income, will your policy provide the income you need to sustain your desired lifestyle?



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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