SOLUTION SNAPSHOT
BUY/SELL FAMILY DYNASTY

What can be achieved...

- Male, Age 56; Male, Age 60; Male, Age 61; Female, Age 62
- Existing Coverage: $10 million on each insured
- Owner: Company owned by insureds
- Company fair market value: $180,000,000
- Company gross sales: $7,118,301
- Company net income (profit): $6,998,301
- Wrote: $20 million of new term coverage on each insured

OPPORTUNITY

...with the right tools...

- Optimal age range of 40-75
- Gifting of family business ownership interest to future generations
- Family estate planning drives gift of shares to second generation
- Funding a new buy/sell agreement
- No corporate coverage in place with multiple owners
- Changes to key people or the buy/sell agreement
- Increased value of the company
- Any change in shareholders or business owners

IDENTIFIERS

...and the right team.

- Determine if any of your clients have an insurance need, based on the Identifiers outlined
- If you identify a potential opportunity to help your clients reach their goals, contact us to review the options

RAYMOND C. NASH
CEO & Principal

rnash@heirmark.com

(330) 801-0061

HEIRMARK.com

NEXT STEPS