SOLUTION SNAPSHOT
RETURN ON INVESTMENT

What can be achieved...

- Male, Age 42
- Goal: Implement a large policy with a short-pay design for estate planning and ROI potential.
- Existing Coverage: None
- Net worth: $58M
- Annual income: $370,000
- Wrote $30M of new coverage
- Total cumulative illustrated premiums: $3,280,580
- ROI Years 10+: 814%

OPPORTUNITY

...with the right tools...

- Optimal ages 30-60
- Ability to pay 10-15 annual premiums at a young age with the death benefit going to heirs
- A desire to use tax-advantaged dollars to multiply the wealth of future generations
- Recently explored, established, or funded a Spousal Lifetime Access Trust (SLAT)
- A projected estate tax liability that exceeds the amount of estate planning coverage inforce
- A sudden increase in net worth from an inheritance or selling a company

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

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NEXT STEPS

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