

SOLUTION SNAPSHOT WEALTH TRANSFER



What can be achieved...

- Female, age 44
- Goal: estate planning via a newly established trust to pass her wealth to her 6 children at \$1M each
- \$700K existing term coverage
- \$13M net worth
- \$250K annual unearned income
- Wrote \$6M of new permanent coverage

OPPORTUNITY



...with the right tools...

- Recently married or divorced
- New children or grandchildren
- Equalizing business succession when one child will inherit the company and the other child will not
- An increase in net worth via an inheritance, the sale of a company, etc.
- Newly established estate planning trust
- A recently deceased spouse or child
- A recently estranged child

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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