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

RAYMOND C. NASH
CEO & Principal

rnash@heirmark.com

(330) 801-0061

HEIRMARK.com

NEXT STEPS