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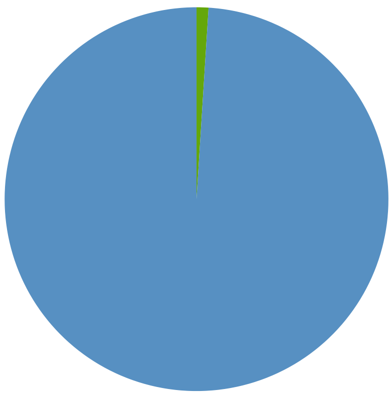
The 1% Solution

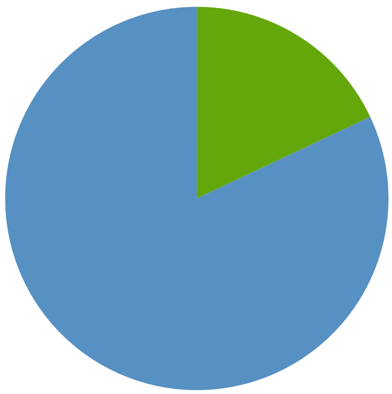
Would your clients feel more comfortable about their financial plan if they could protect their wealth against the impact of:

- ☐ Personal consumption
- ☐ Future healthcare costs
- ☐ Market and interest rate volatility
- ☐ Erosion due to taxation or inflation
- ☐ Unexpected family crisis needs

If you could show them how to provide significant portfolio protection with a simple adjustment to their asset allocation, would they be interested?

Consider the following example of a 60-year-old couple with a current net worth of $10M. If they reallocate just 1% of their portfolio assets each year, they could protect 82% of their current portfolio assets.





Below are hypothetical examples utilizing Survivorship Life Insurance based on re-allocating 1% annually from a $10M portfolio assuming Standard Non-Nicotine rates.

Male/Female Ages	Annual Premium	Death Benefit	IRR at Age 85
60/60	$100,000	$8.2M	7.7%
65/65	$100,000	$6.1M	9%
70/70	$100,000	$4.2M	10.7%
75/75	$100,000	$2.9M	15.7%

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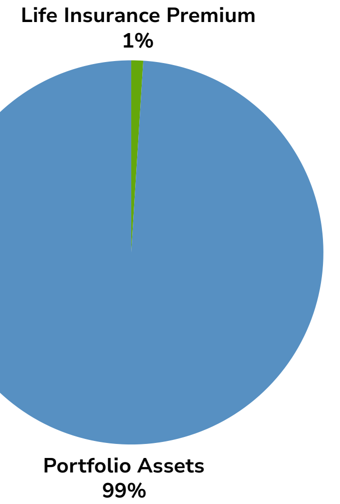
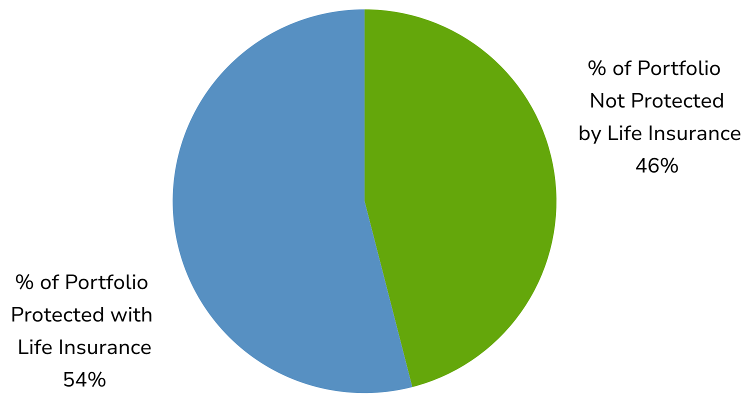
- ☐ Unexpected family crisis needs

If you could show them how to provide significant portfolio protection with a simple adjustment to their asset allocation, would they be interested?

Consider the following example of a 60-year-old male with a current net worth of $10M. If he reallocates just 1% of his portfolio assets each year, he could protect 54% of his current portfolio assets.





Below are hypothetical examples utilizing Single Life Insurance based on re-allocating 1% annually from a $10M portfolio assuming Standard Non-Nicotine rates.

Male Ages	Annual Premium	Death Benefit	IRR at Age 85
60	$100,000	$5.4M	5%
65	$100,000	$4.1M	5.3%
70	$100,000	$2.9M	6.1%
75	$100,000	$2M	9.8%