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WHO DO YOU KNOW THAT'S CONCERNED WITH...

Sick or Hurt and Can't Work Protection

CLIENT PROFILE

- Aged 25 - 55
- W-2 Employee making $100k+ (Employer DI not enough)
- Self-Employed (No Employer DI)
- Business Owners (Multiple Owners with Buy/Sell Agreement)

Client Names:

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Retirement Portfolio Protection

CLIENT PROFILE

- Ages 40-87 ($500k+ Investable Assets)
- Concerned about the monthly cash flow issue a LTC event would create
- Want a plan that protects their family Physically & Financially
- May have personal experience of family/friends needing LTC

Client Names:

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Tax-Efficient Retirement Planning

CLIENT PROFILE

- Ages 25- 60 (15+ year time horizon)
- Has maxed out contributions in their qualified plan
- Unable to contribute to a Roth IRA due to household income
- Goal to reduce taxable income in retirement

Client Names:

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Insurance Portfolio Review

CLIENT PROFILE

- Existing Insurance policy
  - Not reviewed in last 5 Years
- Recent major life events
  - Marriage, Divorce, Purchase
- May benefit from improved industry/product developments
- May benefit from enhanced underwriting innovations

Client Names:

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Surplus Assets (Non-Qualified or Qualified)

CLIENT PROFILE

- Surplus of $250k+
- Might be an existing Annuity, IRA or Cash/Savings/Portfolio
- Not going to use for future income
- May want to leave as a Legacy Asset or use to fund LTC Plan

Client Names:

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Illiquid Estate/Business/Farm-Ranch

CLIENT PROFILE

- Profitable, growing business with gross revenues of $500k+
- Buy/Sell Funding, Key Person Coverage, Succession Planning
- Liquid funds needed for potential Federal/State Estate Taxes
- Desire to "equalize" estate/business/Farm-Ranch among heirs

Client Names:

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