



BUSINESS PLANNING STRATEGIES

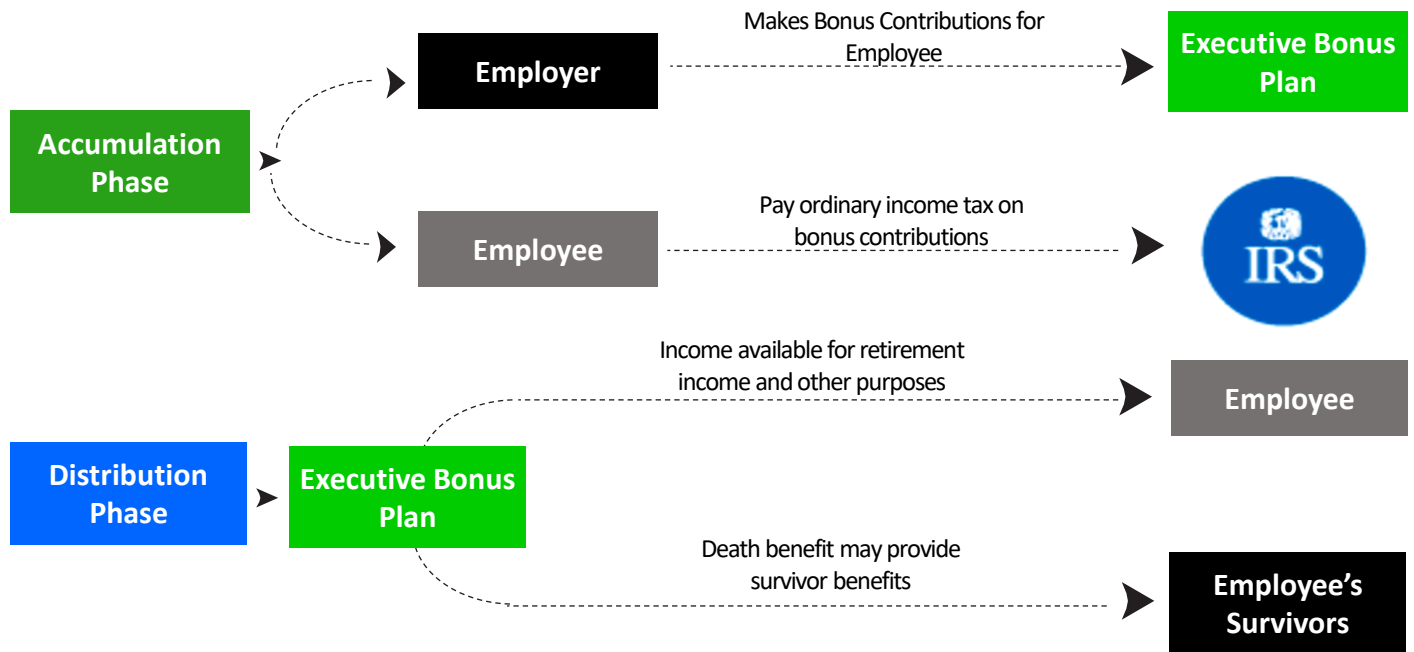
EXECUTIVE BONUS PLUS

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Create an offering of benefits for your key personnel that they value.

DELIVER MULTIPLE BENEFITS, AND HELP YOUR KEY PERSONNEL SAVE FOR THEIR FUTURE.

EXECUTIVE BONUS PLUS - HOW IT WORKS



WHAT FINANCIAL PROFESSIONALS NEED TO KNOW

- 1 Save more:** The employee can save more for retirement; above the limits of a qualified plan, such as a 401(k).
- 2 Receive multiple benefits:** In addition to retirement income, the plan provides access to funds to address unexpected events like disability, Long-Term Care, chronic illness, or other financial needs.
- 3 Enhance financial security:** The employee's family may receive tax-free benefits at time of employee's death.
- 4 Own the policy:** The employee owns the policy but must stay with the employer to be eligible for the bonus.
- 5 Pay potential taxes:** An additional tax may be due if the bonus doesn't cover all of the employee's income tax and can be partially, or fully, offset with an added employer bonus.

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