

INSURANCE BASED RETIREMENT PLANNING

INDIVIDUAL PLANNING

THE RIGHT SOLUTIONS

to provide a more well-rounded plan for the future

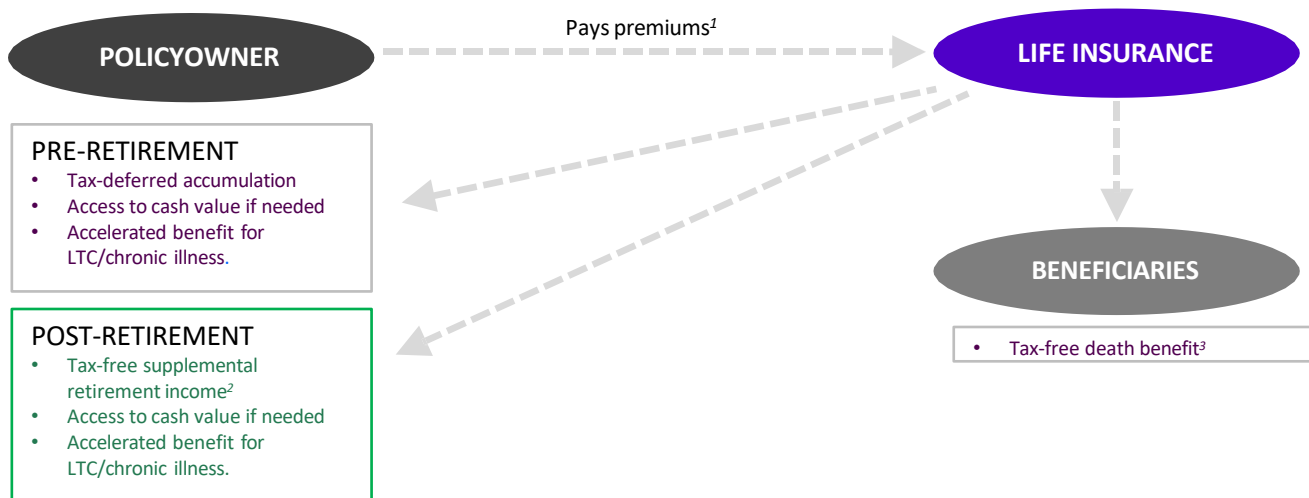
THE POWER OF CASH ACCUMULATION PERMANENT LIFE INSURANCE

NOT SURE IF YOUR CLIENTS WILL HAVE ENOUGH MONEY FOR RETIREMENT?

Retirees face unique challenges, and for many, the savings offered by qualified plans alone is not enough to maintain their current standard of living in retirement. Have you considered incorporating an Insurance-based Retirement Planning (IBRP) strategy to help address potential shortfalls? Let's take a look at the power of cash accumulation permanent life insurance and start by asking these three questions:

- 1. Have your clients saved enough for retirement?**
- 2. Have they considered all of the risks they may face in retirement and created a plan to address each of them?**
- 3. Does your recommended plan protect and provide for their family in the unforeseen event that retirement is shorter, or longer, than expected?**

HOW THE IBRP WORKS



¹ Policy must stay in force until death proceeds become payable; otherwise, lapses or surrenders may result in adverse tax consequences.

² Supplemental income from policy values are withdrawn as loans up to the cost basis within the policy.

³ Not all beneficiaries qualify to receive tax-free benefits. Consult a tax professional for more information.

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