

# LIVING BENEFITS

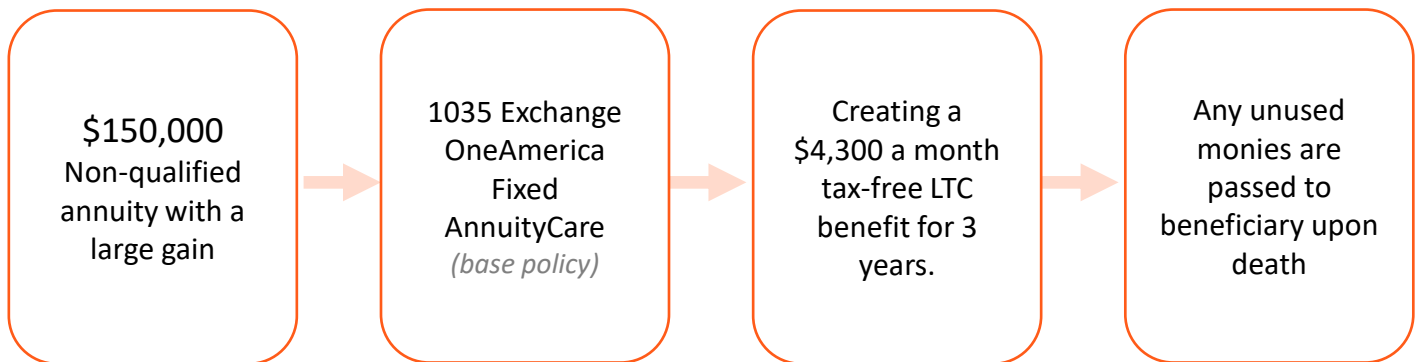
## INDIVIDUAL PLANNING SOLUTIONS

### EFFICIENT FUNDING

To address specific concerns of the client; recommend a 1035 transfer to Annuity Care, base policy only

IDEAL CLIENT	CLIENT CONCERNS
Age 68 to 85; has build up in a NQ Annuity not subject to surrender charges or money from a CD; views proceeds as lazy or emergency money.	Wants to ensure adequate funding for a health care or Long-Term Care (LTC) event. Wants to preserve their principal, receive a reasonable rate of return, and maintain care, custody, and control of the asset (liquidity).

### HOW IT WORKS



**Disclaimer:** Before any annuity exchange is made, all factors should be weighed to verify that the product is appropriate for the client.

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