John Hancock's Advanced Markets 2023 Presentations

Presentation Title	Topic(s) Covered	Description for Promoting Webinar/Presentation	Approximate Time	Sales Ideas
Gifting with Increased Exemptions	Federal estate/gift tax exemptions Lifetime exemption sunset Increase in annual and lifetime exemptions Funding life insurance in a ILIT Reviewing previous gifts	In this webinar we will explore how the annual increase of the lifetime exemption and annual exclusions can be utilized to fund ongoing premiums for ILIT owned life insurance.	**15-20mins**	Gifting with life insurance
Executive Benefits: Using the Reward-Retain Continuum	Executive Benefits Retaining and Reward Key Employees 162 Bonus/Executive Bonus Plans REBA Plans Loan Regime Split Dollar Endorsement Split Dollar Non-Qualified Deferred Comp SERP	In this webinar we will explore the executive benefit continuum from direct cash bonuses -> 162 Bonus -> REBA -> Loan Regime Split Dollar -> Endorsement Split Dollar -> Non Qualified Deferred Comp plans. We look at the level of employer control, ease of administration, and strength of the "golden handcuffs" for each type of plan.	**45 mins**	NQDC & Corp. Split Dollar
Intergenerational Split Dollar: Practical Lessons from the Levine Decision	Intergenerational Estate Planning Legacy Planning GST & Dynasty Trusts Split Dollar	In this webinar we will explore what Intgenerational Split Dollar is and why now it is an important planning topic for high net worth clients. We will also look at the core issues that need to considered and lessons from the Levine decision.	**45mins- 1hr**	Wealth Transfer Split Dollar
Backstopping Sequence of Return Risk Using Life Insurance	Retirement Backstop Supplemental Retirement Income Cash Value Life Insurance	In this webinar we will explore how a client can use cash value life insurance to provide a non-reportable discretionary source of income to help mitigate sequence of return risk.	**20-30mins**	Retirement Backstop
6 pack	There are many ways to fund a trust including gifting, and financing			
Estate liquidity planning for business owners and 6166	Business owners and 6166			
Secure Act 2.0	IRA maximization			
Foreign National				
Invest in your life and health	Invest in your life with Vitality			
Getting Personal with Business Planning	PKP and CEBS			
Estate Planning in a rising interest rate environment				

Back to Basics Series

Presentation Title	Topic(s) Covered	Description for Promoting Webinar/Presentation	Approximate Time	Sales Ideas
Understanding the role of life insurance in estate and business planning	Fundamental uses of life insurance Life insurance for business owners Long-term care coverage via rider Income tax advantages and rates of return	In this webinar we will explore the many uses of life insurance including personal uses of life insurance and planning for business owners. In addition to exploring the various solutions--- a focus on how life insurance should be owned will be discussed.	**30-45mins**	Invest in Your Life
Foundations of trust planning	Revocable vs. Irrevocable Trusts SLATs Dynasty trusts Special Needs Trusts	In this webinar, we will discuss what a trust is, how and why it is used, and the different variations that are used in estate planning- including revocable vs. irrevocable, spousal access, dynasty and special needs trusts. The uses of life insurance in association with trusts will also be explored.	**45mins- 1hr**	Spousal Access Trusts
Transfer tax	Federal estate/gift tax State estate tax Funding ILITs with annual exclusion gifts Marital deduction planning GST tax and exemption	In this webinar we will explore Federal gift & state tax law, look into state estate taxes, Generation Skipping Transfer taxes, and learn how to plan for taxes (marital deduction, trusts, gifting)	**45 mins-1 hr**	Gifting with life insurance
Top 10 planning mistakes related to life insurance	Ownership/Beneficiary designation 1035 exchanges and boot MECs Goodman Triangle Policy valuation etc.	In this webinar we will cover the top 10 planning mistakes to avoid. Everything from trust formalities that must be followed, rules that pertain to business owned contracts, and more.	**45 mins**	Policy Review
Prospecting business owners & key questions	Focus on small business owners Key questions to ask Where to look for clients Opportunities for life insurance for various business needs	This webinar will focus in on key questions to ask and some of the prospecting opportunities available when focused on small business owners. Covering everything from focusing on employee benefits, to buy-sell planning and even planning for their own personal needs"	**45 mins**	Keyperson coverage
Business succession planning	Succession planning vs. buy-sell planning Key prospects Funding a buy-sell Overview of different buy-sell options with examples Business valuation	In this webinar we will explore the various options business owners have with regards to transferring their business and cover why it is important for business owners to consider the legacy plan of their valuable company.	**45mins - 1 hr**	Cross Endorsement Buy-Sell