

Why should I include Insurance as part of my practice?

If you have clients like these...

- professionals, executives or entrepreneurs seeking higher tax-free retirement income
- own concentrated stock
- receive required minimum distributions
- individual retirement or qualified plans over \$500,000
- tax-free bonds worth over \$300,000
- deferred annuities worth over \$200,000
- widows or widowers who are trust beneficiaries
- own a family business they want to leave to the next generation
- business owners with key employees they need to retain and reward
- own life insurance with high cost basis & low cash value
- own survivorship insurance
- capable of making significant gifts of cash or assets to their children
- recently purchased life insurance and charitably inclined

...there are significant opportunities where *insurance* will help meet your client's planning needs.



Advisor's Choice
INSURANCE BROKERAGE SERVICES

Thought Partnership for Life