

SALES STRATEGIES OVERVIEW

1

INSURANCE NEED

All sales strategies start with a life insurance need, like protecting the value of a client's business to help them enhance the legacy that they can leave to future generations.

2

THE CLIENT'S GOAL

Each sales strategy can help clients achieve specific financial goals. Determining what these goals are will help you position the most appropriate strategy.

PROTECT



- Satisfy corporate insurance need without giving up liquidity in existing portfolio
- Minimize corporate tax burden associated with taxable investments
- Enhance the corporation's value at death for future generations
- Diversify corporation's asset mix

CORPORATE ASSET TRANSFER STRATEGY

ACCESS



- Enhance the corporation's value at death for future generations
- Access assets to supplement business income, if needed
- Minimize corporate tax burden associated with taxable investments

CORPORATE RETIREMENT STRATEGY

TRANSFER



- Maximize the corporation's value at death for future generations
- Minimize corporate tax burden associated with taxable investments
- Provide additional tax-preferred ways of increasing the corporation's value

CORPORATE INVESTMENT STRATEGY

3

DEATH BENEFIT

The tax-free death benefit is paid directly to the corporation, allowing clients to use the corporation's capital dividend account to help them enhance their legacy and achieve their financial goals.

WE HELP. BY PROVIDING A FLEXIBLE AND SIMPLE SOLUTION WITH GROWTH POTENTIAL.

YOU GROW. THROUGH YOUR COMMITMENT TO MEETING CLIENTS' CHANGING NEEDS.

NEXT STEPS

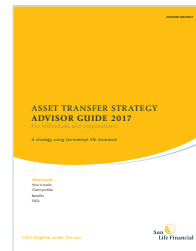
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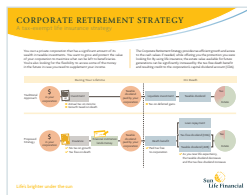


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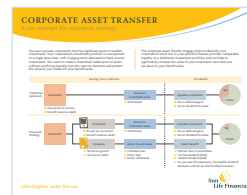
SALES STRATEGIES



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Life's brighter under the sun

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