

# A New Solution for Your Clients!

## KEY FEATURES

- **Immediate Tax Deduction**  
– *helps clients reduce their taxable income*
- **Immediate or Deferred Income Payments**  
– *tax-advantaged payments*
- **Creates a Structured Inheritance for Heirs**  
– *no trust set-up costs or administration –*
- **Turnkey program**
- **Easy to Explain & Present**
- **Payouts from Charity Reinsured**  
– *by Major Insurance Companies*
- **7% Referral Fee for Any Age Client**
- **Clients Recommend Charitable Grants**  
– *to their favorite charities*

## GOOD PROSPECTS

- **Annuity Owners** – *who plan to pass their annuities to their heirs*
  - Offset Taxable 1099 Gains
  - Reposition to create Structured Inheritance
  - New Contract at Full Accumulation Value
- **Pre-Retirees** – *in high tax brackets*
  - Tax Deduction now, with Deferred Income later
- **Clients wishing to exit from Appreciated Securities & Real Estate**
  - Eliminate or minimize capital gains
- **Grandparents Desiring to Fund Education for Grandchildren** – *and benefit from immediate tax deduction*
- **Clients wishing to support their Favorite Charitable Causes** *WHILE creating income or an inheritance for their family*

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*Your annuity resource*

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