

# Worksheet

## Current Savings

Current Asset Value

Current Interest Rate

Current Legacy Value

## Control & Guaranteed Growth

*Multi-year guarantee annuities are a great way to accumulate on a tax-deferred basis, but create tax liabilities for owners and beneficiaries.*

5 Years

6 Years

7 Years

## Control & LT Care Leverage

*All the benefits of multi-year guarantee annuities with charges debited for a guaranteed long-term care benefit.*

LT Care Amount

Interest Rate

## LT Care Leverage & Wealth Transfer

*The benefits of life insurance (tax-free wealth transfer) bundled up with the option of long-term care. If LT care option is activated, remaining death benefit (if any) transfers to heirs.*

LT Care Amount

Interest Rate

## Wealth Transfer with Cash Value

*The benefits of life insurance (tax-free wealth transfer) with added option of cash value build-up. The cash value can be taken as tax-free loans providing increased flexibility.*

Cash Value Amount

Wealth Transfer Amount

## Tax Free Wealth Transfer

*The benefits of life insurance (tax-free wealth transfer) with the maximum amount of death benefit possible.*

Pure Wealth Transfer
NO Cash Value

Wealth Transfer Amount

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