TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
754-200-1675

LEVERAGED LIFE INSURANCE

Leveraged life insurance solves big problems for the right clients

For high-net-worth clients with business interests or concentrated assets, leveraged life insurance addresses two of the most significant planning challenges at once.

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Two challenges, one strategy

It keeps productive capital deployed while creating a tax-efficient solution for business succession and wealth transfer.

THE CORE BENEFIT IS SIMPLE

Keep the best assets working

Rather than redirecting high-performing capital to fund large insurance premiums, clients can use leverage to cover those costs while leaving their best assets earning elsewhere.

LIQUIDITY ON TIME

No forced sale at the worst moment

The death benefit then creates the liquidity needed to fund a buy-sell agreement, equalize inheritances or cover estate taxes without forcing a sale at the worst possible time.

Tax efficiency for business owners

The strategy can be structured so that proceeds pass income-tax free to heirs or a trust, while keeping the policy outside the taxable estate when properly owned. For business owners in particular, that combination of tax efficiency, succession funding and capital preservation is difficult to replicate through any other single strategy.

Would your clients benefit?

The clients who benefit most are typically those with illiquid assets, significant estate tax exposure, or a business transition that requires a defined funding mechanism.

"We work hand in glove with the client's trusted advisors — attorneys, accountants and family offices — to ensure every component of the client's financial life aligns."

SCHEDULE A FREE STRATEGY SESSION

mike@taxefficientsolutions.com

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