TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
754-200-1675

SUCCESSION PLANNING

Life insurance bridges the succession planning gap

A properly structured life insurance policy can help protect your client's life's work and their family's financial security.

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Only 30%

of small businesses survive through the second generation due to a lack of succession planning, according to a study conducted at Northwestern University.

What does this mean for your clients?

To protect your client's life's work and their family's financial security, a properly structured life insurance policy is the most reliable way to fund a seamless business transition.

Whether it is used to fund a buy-sell agreement, provide key-person coverage, or prevent the forced liquidation of their assets, life insurance delivers immediate, tax-free liquidity exactly when it is needed most.

OUR APPROACH

Custom strategies for every transition

We create custom life insurance strategies that help facilitate the proper succession plan.

"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

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