

Agency Sample Client Case File



Mary B. Age 62 Female



Stats.....

- *Retired School Teacher
- *Widowed
- *Has 1 Adult Daughter/Single
- ***Owned Bank CD 25,000 paying 1.7%**

Financial Problem..... Mary wanted to leave money for her daughter for a down payment on a house or to pay debt off when Mary passed away. Her current Bank CD interest earnings were so low, Mary could not hope for leaving a larger sum to her daughter.

Solution.....

I showed Mary how a Single Premium Life Insurance could more than double her daughters inheritance by **turning that 25,000 into and immediate death benefit of 68,000,**

Mary applied for and was accepted for a guaranteed policy. Mary transferred her CD money to the Insurance Company and received her policy to leave more than twice the amount she would have been able to leave before.

This is a common Estate Planning technique I use often in my practice. Using Life Insurance to increase wealth is a wonderful thing for you and your family. Would you like to see what your dollars equal in Single Premium Life? Contact me today!

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