

It pays to keep things simple.®

Enhancing Legacy Assets

Your clients work hard to build their retirement savings, and leaving a legacy may be a key part of their plan. Some clients may already have a legacy fund set aside, which could be earning only minimal interest. The Inheritance EnhancerSM rider from Great American Life® can help clients take these assets further.

How It Works

Say you have a client with a \$100,000 legacy fund. By splitting this fund between a conservative portfolio and an FIA with Inheritance Enhancer, see how they could still leave over \$100,000 for their loved ones, while securing over \$50,000 for their own retirement goals.



Inheritance Enhancer At A Glance

Issue ages: 50-85, no medical underwriting required

Rollup credit: 8% simple interest for up to 10 years

Rider charge: 0.95%, with refund if the insured passes during first five years

Death benefit: lump sum or annuitization, owner may designate for beneficiary

A \$100,000 legacy fund can go further than your clients may think. Talk to them about how Inheritance Enhancer can fit into their financial portfolio.

The Inheritance Enhancer rider issued by Great American Life Insurance Company® (R6042513NW) is an optional rider for which there is an annual charge of 0.95%. Rider is not available with all products and may not be available in all states. Form number may vary by state. You and your clients should consider all features, benefits and costs before they purchase an annuity and/or optional rider.

Not FDIC or NCUSIF Insured No Bank or Credit Union Guarantee May Lose Value Not Insured by any Federal Government Agency Not a Deposit