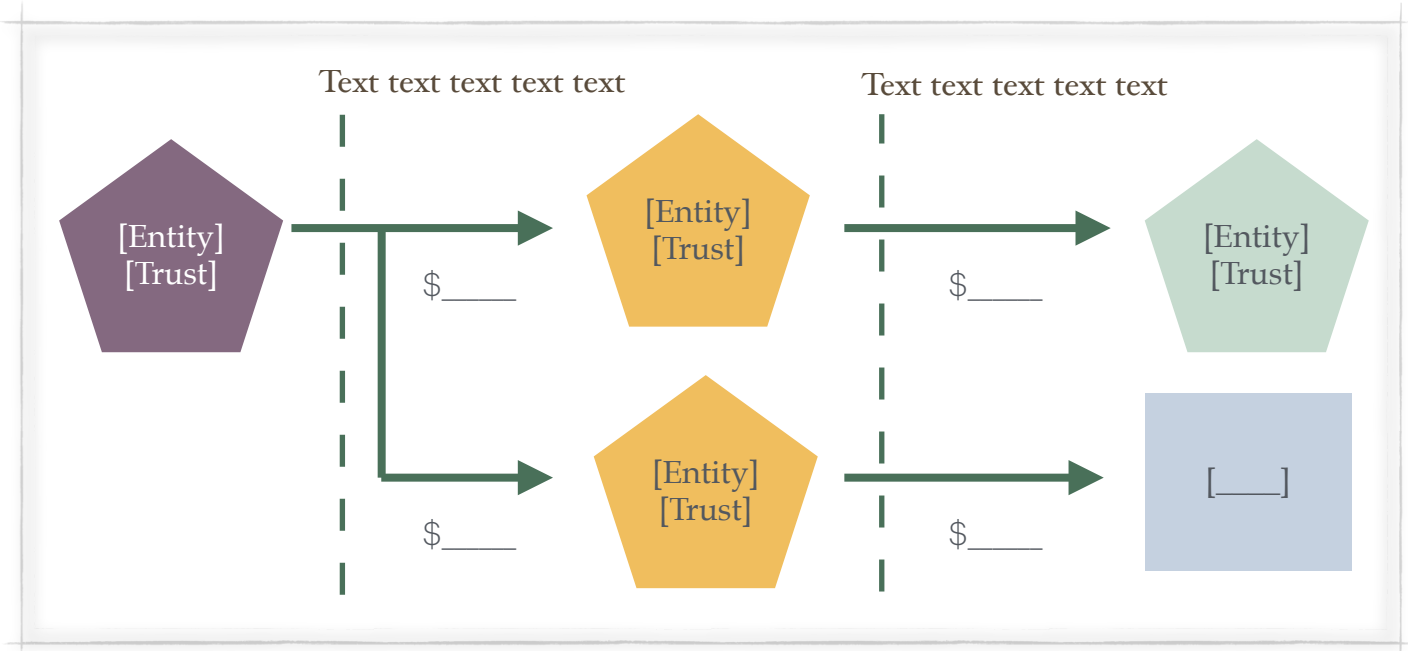


[ STRATEGY NAME]

Prospect Curator

- ✓ UHNW
- ✓ Liquidity Risk
- ✓ Transfer Tax Exposure
- ✓ Real Estate Professional
- ✓ {Client Attribute}
- ✓ {Client Attribute}
- ✓ {Client Attribute}

Back of the Napkin



The Pitch

This is where an executive summary, or elevator pitch, of the client-strategy is added. A few sentences that communicate who is involved and how funds flow between the parties or what’s involved in the process. This space is valuable and should capture the readers attention by summarizing the strategy in a clear and compelling manner. The message should be delivered quickly and easily.

This paragraph builds upon the first. Perhaps there is a description of the second or third parts of the structure, or key elements or outcomes of the relationships or transactions. This paragraph may provide additional description but not become too detailed. Details can be provided on page 2. The key elements and purpose of the strategy or case study should be evident.

Last line of text. The value-add. Punch line. Leads into “at the end of the day” Rewards, below.

Rewards

- ✓ Legacy Asset Preservation
- ✓ Creditor Protection
- ✓ Tax Savings
- ✓ {Reward}
- ✓ {Reward}
- ✓ {Reward}
- ✓ {Reward}

## Client Needs

Describes the client's situation, their existing reality, competing interests, practical concerns and considerations, present and future risks, and the meaning behind, or gravity of, these facts and circumstances to demonstrate the client needs. There are only four lines of space, maybe three or four compelling sentences. The client needs must be clear and present.

## The Elixir

Without repeating the Innovative Solution, Rewards, or Client Needs, this paragraph should create a bridge from Client Needs to the solution with an eloquent description of the strategy's positive impact or expected result. Again, this must be accomplished quickly, in three or four clear and convincing sentences. At this time, needs, solution and "the point" should be clear.

## Insurance+

A paragraph is provided to identify and briefly describe the type(s) of insurance product(s) that support or magnify the effect of the Solution. This paragraph shouldn't list the basic benefits of different products, but rather explain why one or more categorical or particular insurance products are suitable and appropriate for the solution proposed. Some explanation and details are ok but the purpose is to connect the dots to insurance.

## Landmines

Every strategy has some legal red lines, risks, and vulnerabilities. Case studies reveal fatal flaws and "bad facts" to avoid during planning and execution. Don't step on these landmines:

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## Path to Close

### Head Start on Diligence

The following information and samples will sustain momentum toward closing:

- ✓ **Proof of Concept** — Review a case study. Share it with the client.
- ✓ **Client Letter re: Next Steps** — Summarize the value proposition and gather info to proceed.
- ✓ **Balance Sheet** — Complete the form. Identify legacy assets to be preserved.
- ✓ **Cash Flow Analysis** — Does the financial model show premiums can be paid from excess cash flow (i.e., cash not needed for living expenses, gifts, capital calls, and taxes)?
- ✓ **Transfer Tax Exposure** — How much estate tax would be owed today, at life expectancy?
- ✓ **Educate Centers of Influence** — Follow the **Levine** case. Don't be the next **Morrisette** or **Cahill**.

### What Will Clients Ask?

Q. We don't know what we don't know. Insert a simple but important client question here.

A. The first question should be answered in two lines. The question shouldn't be an easier yes or no answer. It must be worthy of at least a two sentence response.

Q. An important question that deserves a longer answer should be placed here.

A. This question should be higher level, perhaps more big-picture, or focused on a controllable variable that determines success, and the answer should be grounded in risk/reward, maximizing utility, adding tangible and/or intangible value. There is ample space here. A quick comparison of pros and cons can fit, if the comparison or contrast is made briefly. The final sentence or two should reconnect the important elements to the client's situation and goals.

## Sustain Success

### Stay in Contact

- \* Every strategy has some best practices, and periodic administrative or maintenance requirements. Filings, notices, reviews and reports matter. Set reminders. Check-in and follow up. Build trust.
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### Look Ahead

✍ What's on the horizon? What's next? Other strategies the client might consider? What are other people doing or discussing on this topic? Commentary, big new questions, future discussion points, and forward-looking thoughts should be summarized here, with links to other materials, trainings , etc.

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