



Create it.

The foundation of creating wealth through the INC Wealth Strategy is storing money in a properly designed whole life insurance policy.

Creating Wealth for You

- Your money will continue to grow inside your policy even while you access for other purposes.
- This allows you to earn on a larger volume of dollars than you can save.
- On the backend, your policy will generate a tremendous amount of tax-free retirement income.

Creating Generational Wealth

- While it's not the primary purpose of the policies, by storing money in a life insurance policy creates a death benefit for your heirs.
- Using the cash value to finance the purchases of future generations keeps the interest that would have been paid to others in the family.



Grow it.

Your money is guaranteed to grow inside your policy at a steady, tax-free rate no matter what the market does.

Title Here

- In addition, your policy is scheduled to earn dividends on top of the guaranteed growth each year.
- By using the cash value outside your policy to finance purchases, a portion of the interest you would have paid to someone else is redirected to you.
- Using your cash value for purchases is also better than using cash because the money you spend will continue earning for inside your policy even though you've borrowed against it.



Keep it.

The foundation of creating wealth through the INC Wealth Strategy is storing money in a properly designed whole life insurance policy.

Avoid Market Losses

- The INC Wealth Strategy is not based on the stock market or other speculative investments.
- Market losses will never reduce your cash value.
- As the cash value of your policy increases, it can never go down.

Taxes

- Because of the tax treatment of life insurance and how we access the gains, the growth in your policy is not just tax-deferred, it's tax-free.
- Similar to a Roth IRA, the money you put into the policy is after-tax money therefore the gains will then be tax-free.

