



## Presentation Resources

### Presentations

- ☐ Life Insurance & Financial Planning
- ☐ Life Insurance Pricing Game (AIM) The Story Behind the Story

### Estate Planning

- ☐ Wealth Stabilization In a Down Economy
- ☐ Pension Maximization- Getting the Most out of Pension Plan Options
- ☐ Self-Canceling Installment Notes
- ☐ Capital Transfer

### Business Continuation Planning

- ☐ Reduce and Defer
- ☐ Succession & Exit Planning for Small Business's

### Executive Compensation

- ☐ Non Qualified Executive Compensation Plans
- ☐ 401-(k) Mirror Voluntary Deferral Plan Using Life Insurance for Executives
- ☐ Endorsement Split Dollar Using Life Insurance
- ☐ Private Non-Equity Collateral Assignment Split Dollar Using Life Insurance

### Retirement Planning

- ☐ Section 79 Plans
- ☐ Qualified Combo Plans
- ☐ Financial Risks for Retirees & How to Reduce the Withdrawal Rate Risk

### Income Protection

- ☐ Income Protection - ABC's of Disability Income Protection & Qualified Sick Pay Plans
- ☐ Long Term Care - Consumer Presentation
- ☐ Long Term Care - Tax Benefits of LTC-I Executive Carve Out Plans

### Charitable Planning

- ☐ Charitable Tax Planning and Life Insurance