

Executive bonus

Opportunity tracker

Name: _____ Agent code: _____

Email: _____

An executive bonus plan funded with life insurance can help reduce turnover of key employees that could result in potentially significant financial losses.

FUND AN EXECUTIVE BONUS ARRANGEMENT WITH LIFE INSURANCE

Benefits for business owners:

- Incentivizes employee retention with an attractive benefit
- Offers tax advantages for the business
- Can be offered to selected employees
- No IRS approval required
- Easy to implement and administer

Benefits for employees:

- Provides death benefit protection
- Provides an attractive compensation package
- Employer bonus pays the life insurance premium
- Cash value of the policy is tax-deferred
- Employee retains control of the policy as the owner

Give clients a win-win business solution with an executive bonus arrangement.

List the names of five business clients who could benefit from this strategy.

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

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