

Comprehensive Brokerage Services

Presentation Topics

Effective Wealth Transfer

- Supercharging Gifts
- Private Loan-Based Wealth Transfer
- Private Split-Dollar
- Life Insurance Premium Financing
- Asset Max (Annuities, CD & QPs)

Estate Tax Planning

- Transfer Taxes, Explained
- Trust Planning
- Four Ways to Pay the Estate Tax
- Installment Sales to Grantor Trusts
- Grantor Retained Annuity Trusts (GRATs)

Business Risk Mitigation

- Buy-Sell Planning
- Buy-Sell Reviews
- One-Way Buy-Sells
- Stay Bonus
- Insurance LLCs
- Key Person Protection

Business Planning Opportunities

- Non-Qualified Deferred Compensation
- Split-Dollar Executive Benefits
- Short-Term Deferral Benefits
- Unlocking C Corp Earnings

Foreign Nationals

- In-Bound/Outbound

Family Insurance Planning

- How much protection is enough?
- Planning for Blended Families
- Estate Equalization
- Special Needs Trusts
- Addressing Illiquidity
- Long-Term Care Protection

Best Practices

- Fiduciary Risk Management Fundamentals
- Identifying Common Risk Management Strategies
- Fiduciary Client Insurance Information & Deliverables
- Fiduciary Policy Review
- Modeling Protection Products in Your Financial Software
(eMoney, MoneyGuidePro, RightCapital, etc.)

Products & Concepts Training

- Policy Evaluation
- Wealth-Transfer Oriented Products
- Accumulation-Focused Products, Uses & Applications
- Capital Preservation Annuities
- Income Annuities
- Mortality-Based Products: LTC & DI

Retirement & Income Planning

- Life as a Sequence Risk Hedge
- Roth Alternative
- Asset & Income Maximization (Asset Allocation)
- Guaranteed Income
- Income Disability Protection
- LTC/Income Disability Protection in Retirement

Comprehensive Brokerage Services, LLC
500 Marschall Road #200
Shakopee, MN 55379
Phone (763) 450-1870

