

2018 InsMark Symposium EAST

September 14 - 15, 2018 | Philadelphia, PA

Strategic Alert #10

[Listen to what fellow producers have to say about the InsMark Symposium.](#)

The purpose of Strategic Alert #10 is to highlight a portion of the Main Platform on Day 1 of the [2018 InsMark Symposium East](#) scheduled for September 14 - 15, at the Courtyard Marriott (and adjacent to the Marriott Downtown) in Philadelphia.

The Triple Play of Executive Trifecta[®]



**Symposium East Presentation by: Robert B. Ritter, Jr.
President/CEO, InsMark, Inc.**

Designing benefit plans for important, non-owner officers of any organization is a lucrative marketplace. Executive Trifecta provides you with an unusual competitive opportunity because of these features:

- ✓ Funding has a positive impact on sponsor's P&L in early years;
- ✓ Indemnity for the firm if the participant dies;
- ✓ No out-of-pocket costs for the participant;
- ✓ Survivor benefits for the participant's family;
- ✓ Tax-free retirement benefits;
- ✓ "Golden handcuffs" that improve retention.

You can provide all those features with Executive Trifecta, a module in the InsMark Illustration System. Executive Trifecta also works for tax-exempt organizations – think of college presidents and coaches, directors of artistic performance (e.g., symphony, ballet, opera, etc.), heads of medical foundations, religious organizations, and other charitable organizations.

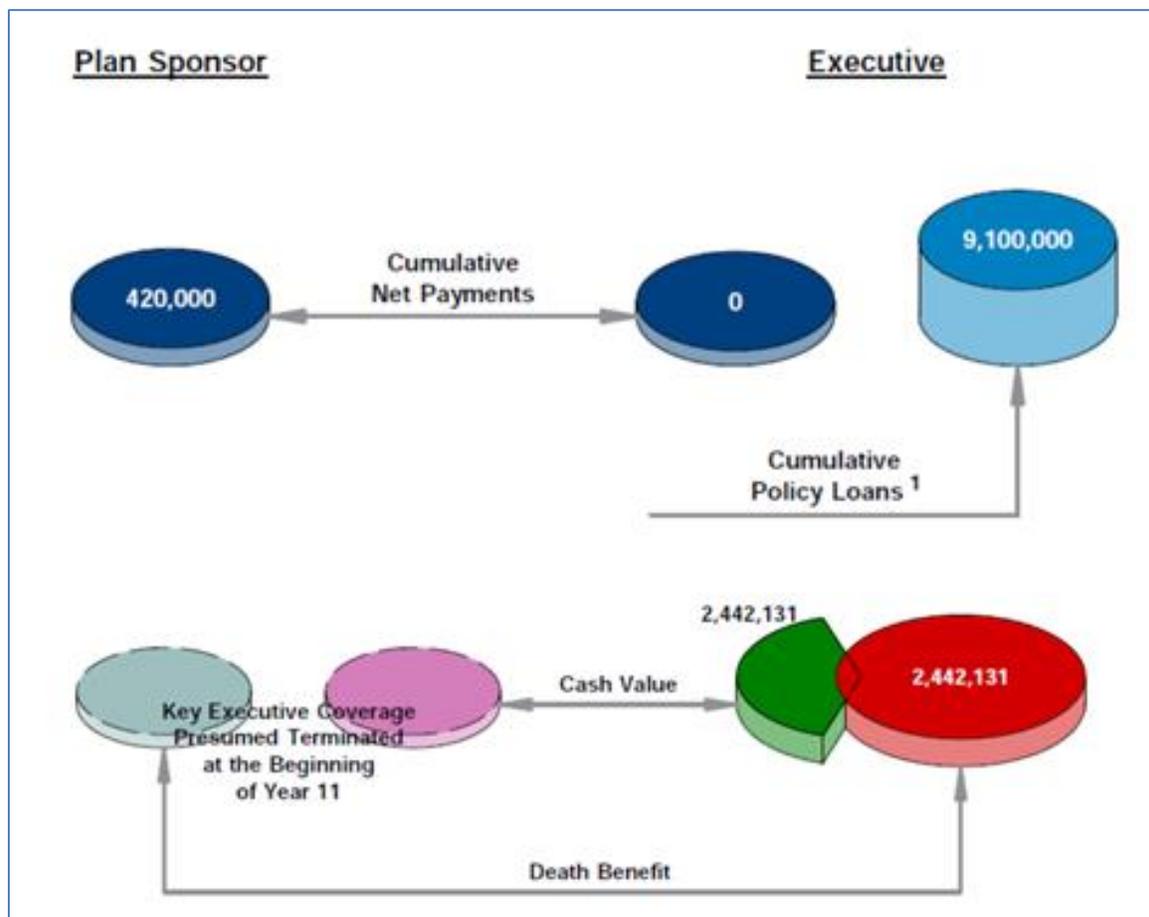
One sure way to ramp up activity regarding benefits for critical non-owners is to ask business owners this question:

"Do you have executives who are so valuable that you want to do whatever is economically reasonable to induce them to stay with you?"

If the answer is "Yes," respond with something like this:

"Retirement planning concerns are on the minds of most of your executives. I'd like to show you a cost-efficient way your company can increase retention by providing tax-free retirement benefits to selected executives. Would you like to see how it works?"

Below is a 60-year summary graphic of a typical plan for a male, age 40:



Note: Executive Trifecta is a sister product to our new Dual Security Plan, a benefit primarily designed for principals of LLCs, LLPs, and Partnerships. These organizations also have critical, non-owner officers where benefit plans like Executive Trifecta can boost retention.

Contact Julie Nayeri at 1-888-InsMark (467-6275) or julien@insmark.com for more information on the Symposium or click below to review the Agenda and/or register online:

If you would like to review any of the prior Strategic Alerts relative to the 2018 Symposium East, see the links below.



[Symposium East Agenda](#)

New details are added frequently.



[Register Now](#)

Online registration is open. Act now - seats are limited!



[Beginners Workshop](#)

September 13, 2018
2pm - 6pm

I look forward to seeing you on September 14 - 15 in Philadelphia.

Bob

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Prior Summaries of Topics to be Discussed at the 2018 Symposium

[Symposium Strategic Alert #1: \(5/15/18\)](#)

Dual Security Plan - A New Executive Benefit (with unbelievably favorable tax consequences)

[Symposium Strategic Alert #2: \(5/22/18\)](#)

Family Net Worth (a new way of presenting the effectiveness of wealth planning)

[Symposium Strategic Alert #3: \(5/29/18\)](#)

Best Policy for My Clients (examining a client's risk profile in order to determine the best type of policy for that client)

[Symposium Strategic Alert #4: \(6/5/18\)](#)

The InsMark Symposium is coming to Philadelphia. Learn more about this meeting and why you should attend. Limited Seating!

[Symposium Strategic Alert #5: \(6/12/18\)](#)

InsMark's *Advanced Consulting Group* -- specialist firms available for joint case development in premium financing, COLI, BOLI, qualified plan optimization, life settlements, and institutionally-priced life insurance for high net worth investors.

[Symposium Strategic Alert #6: \(6/19/18\)](#)

The double arbitrage of Indexed Universal Life coupled with Premium Financing enhances a Roth IRA conversion in astonishing ways.

[Symposium Strategic Alert #7: \(6/26/18\)](#)

This Beginners Workshop focuses on two key InsMark systems: *Wealthy and Wise*, and *InsMark Illustration System*. We will go through the input steps needed to build basic cases, teach you how to navigate through the systems, and explain how the cases are organized.

[Symposium Strategic Alert #8: \(7/10/18\)](#)

"Jim Harbaugh" Split Dollar is the name of a particular variation of split dollar life insurance granted by the University of Michigan to this well-known coach of its football team. His plan has received extensive coverage by the media from ABC News to ESPN. It has also received serious attention from insurance producers wanting to offer duplicate versions to some of their high-end clients. You can design this plan with InsMark, and this Symposium session will show you how.

[Symposium Strategic Alert #9: \(7/17/18\)](#)

Three strategies for designing compelling Permanent vs. Term comparisons for those who own – or are thinking of owning – term insurance.

Important Note #1: The hypothetical values associated with this Strategic Alert assume the nonguaranteed values shown continue in all years. This is not likely, and actual results may be more or less favorable. Life insurance illustrations are not valid unless accompanied by a basic illustration from the issuing life insurance company.

Important Note #2: This information is for educational purposes only. In all cases, the approval of a client's legal and tax advisers must be secured regarding the implementation or modification of any planning technique as well as the applicability and consequences of new cases, rulings, or legislation upon existing or impending plans.

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