ADVANCED PLANNING

Explain complex life strategies more easily

PRUDESIGNS CAN HELP

When you work with clients for whom advanced strategies may be a solution, PruDesigns customizable life insurance concept illustrations can help you improve their understanding of these complex ideas.

These custom concept illustrations run by our Advanced Planning team are tailored to a client's circumstances, enabling you to show how a strategy would work specifically for them. Additionally, the concept illustrations are packaged with the product illustration, providing one professional document you can present to elevate the client experience.

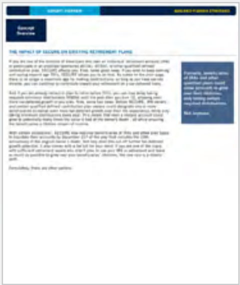
With affluent clients, PruDesigns reports can help explain wealth transfer planning, from simple estate planning to sophisticated trust, charitable, and retirement planning.

With business owners, these reports can help address their unique challenges and opportunities, from entity planning to business succession planning, executive benefits, and estate equalization.

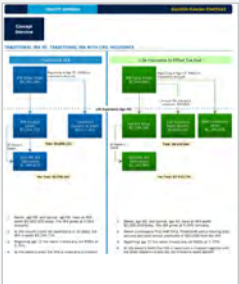
Why use PruDesigns?

- Makes complex strategies easier for clients to understand
- Improves the client experience with a cohesive, customized presentation tailored to their unique situation
- Complements Prudential marketing materials, providing you with a new comprehensive tool for support at the point of sale

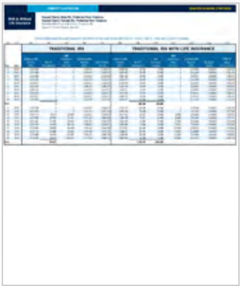
To account for all of the ways clients may absorb information, each PruDesigns concept illustration presents the proposed strategy using three different modes:



Narrative *that explains the idea and benefits to the client*



Visual representation *of the strategy in action using charts and figures*



Numerical ledgers *explore how the concept works in detail*

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Prudential

Reports Available:

Premium Paying Strategies

- Intra-Family Loan
- Premium Financing
- Asset Sale to Grantor Trust
- Private Split Dollar

Wealth Transfer Planning

- Estate Tax Calculator
- Leveraged Gifting
- Dynasty Trust

Charitable Planning

- Charitable Remainder Trusts
- Zero Estate Tax

Business Continuation

- Buy/Sell Funding
- Estate Equalization

Executive Compensation

- Employer Split Dollar
- Executive Bonus – REBA & Section 162
- Deferred Compensation – SERP

Post-SECURE Act Distribution Strategies

Mirrored Loans

Elevate the client experience and make complex strategies easier to understand with PruDesigns.

To request a PruDesigns report, call your Prudential wholesaling team or Advanced Planning at 800-800-2738 Option 4.

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