

# Executive bonus

## Opportunity tracker

Name: \_\_\_\_\_ Agent code: \_\_\_\_\_

Email: \_\_\_\_\_ MGA: \_\_\_\_\_

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