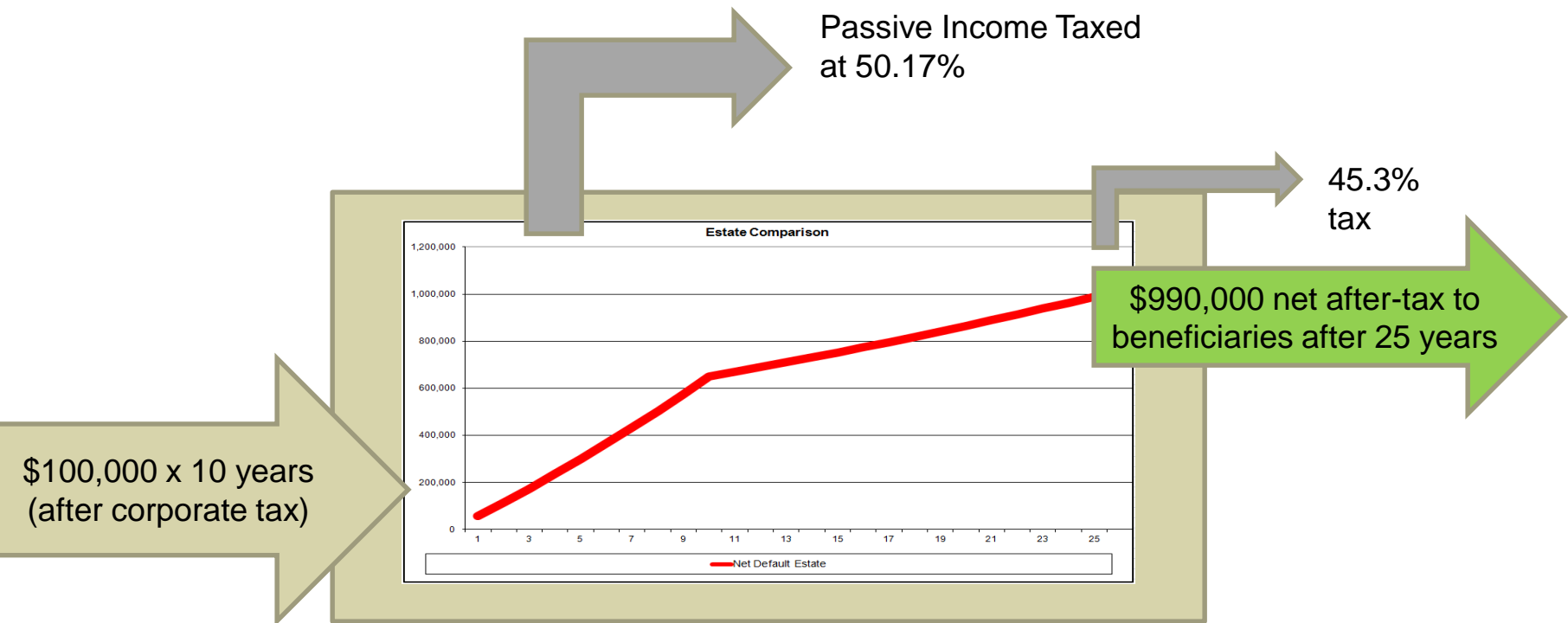


# Current Situation

**WEALTH**insurance.com<sup>®</sup>  
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## Sample Case

Married couple, age 65

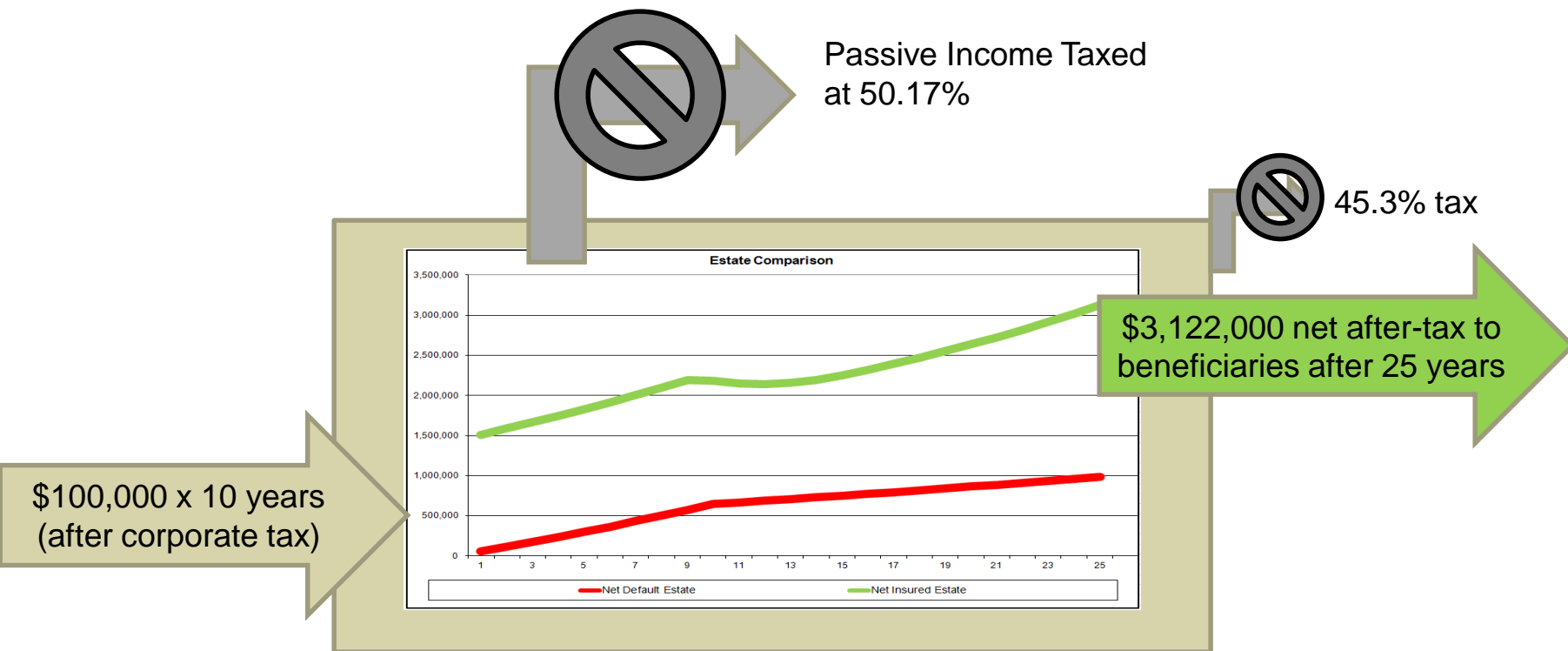
Holdco deposits \$100,000 annually, for 10 years only. Funds earn 4% rate of return.

After 25 years, beneficiaries receive net after-tax proceeds of approx. \$990,000.

E&OE

# Tax-Exempt Life Insurance Investment

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## Sample Case

Married couple, age 65

Holdco deposits \$100,000 annually, for 10 years only, in a joint last-to-die tax-exempt life insurance policy

After 25 years, beneficiaries receive net after-tax proceeds of approx. \$3.12 million, v. \$990,000 in current situation

The equivalent rate of return is approximately 13%

E&OE