



Tools and Techniques of Life Insurance Planning (Tools & Techniques)

By Stephan R. Leimberg, Jr. Doyle, Robert J.

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Discover proven methods for determining a client's life insurance needs and close more sales than ever before with the helpful hints throughout. Unique charts, checklists, and real-world examples help immediately apply skills and identify the impact of new regulations on existing paradigms. Tools & Techniques of Life Insurance Planning features extensive coverage of 10 policy types with quick comparisons.

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Income & transfer tax consequences of life insurance

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New split dollar regulations for old & new arrangements

always matching product to problem with revised formulas, worksheets and rules of thumb!

Guides through the process of evaluating existing life insurance plans and formulating new strategies. Provides a comprehensive introduction and focuses on substantive discussions and applications of each plan. Some techniques examined: buy-sell agreements; charitable planning; death benefit only plans; qualified/nonqualified plans; IRC Section 162 plans; key employee life insurance; roles of revocable and irrevocable trusts.

Authors simplify by defining Tools & Techniques; indicating when to use; analyzing advantages/disadvantages; identifying tax implications; addressing alternatives; calculating fees or other acquisition costs involved; selecting best client-based plans. The appendices consist of technical explanations of: generation skipping transfer taxation; treatment of modified endowment contracts and IRC Section 1035 exchanges; benefits income taxation; transfer for value rule.

Newly Revised delivering sweeping changes from COLI Best Practices Act of 2006, PPA of 2006, and TIPRA of 2006. Life Insurance, PACE, and CFP® CE Filed.

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Variable and Variable Universal Life
Irrevocable Life Insurance Trusts
Key Employee Life Insurance
Accelerated Death Benefits and Viatical Settlements
Survivorship Life
Buy-Sell Agreements
Life Insurance in Qualified Plans
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In each of our books we had one major goal in mind: To create the single best
source of up-to-date, pragmatic and transferable information on the topics you
need to help others.

Stephan R. Leimberg, Lead Author of Tools & Techniques

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