

Possible Charitable Gift Annuity Prospects

- ✓ Do you have clients over the age of 65?
- ✓ Do you know of individuals over the age of 65 with a desire to supplement their present income?
- ✓ Do you know someone who is tired of market volatility?
- ✓ Do you have clients with problematic real estate?
 - Rental Properties
 - Raw Land
 - Farms
 - Second Homes
 - Commercial Properties
- ✓ Do you have clients who are unhappy with the performance of their insurance annuity?
- ✓ Do you have clients who no longer want or need their life insurance contracts?
- ✓ Do you know of individuals who are looking for a large tax deduction?
- ✓ Do you have clients who are uninsurable?
- ✓ Do you have clients desiring to set-up a college savings program for a grandchild and at the same time receive a tax benefit?
- ✓ Do you have clients wishing to transfer tax-free proceeds to their heirs and loved ones?

Please contact for more information

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