

IDEAL CLIENT

Age 68 to 85; has build up in a NQ Annuity **not** subject to surrender charges or money from a CD money; **views proceeds as lazy or emergency money.**

CLIENT CONCERNS

Wants to ensure **adequate funding** for a health care or Long-Term Care (LTC) event. Wants to **preserve their principal, receive a reasonable rate of return,** and maintain **care, custody, and control** of the asset (liquidity).

THE SOLUTION

To address specific concerns of the client; recommend a **1035 transfer to Annuity Care**, base policy only.

HOW IT WORKS



IMPORTANT DISCLAIMER

Before any annuity exchange is made, all factors should be weighed to verify that the product is appropriate for the client.

For more information contact your local AIMCOR member agency or visit www.aimcorgroup.com

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