

IDEAL CLIENT

Age 50-70; 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 Hansen Brokerage Services. 616-940-4004

Information provided by OneAmerica. AIMCOR Group, LLC is an approved distributor for OneAmerica and is authorized to use this material.

AIMCOR Group, LLC is not an insurer and does not issue contracts for coverage. All rights reserved. AIMCOR Group, LLC is a national marketing organization. Our affiliate agencies are member Brokerage General Agencies and AIMCOR Group, LLC is not liable for any agreements or contracts between our affiliate member organizations and the financial professionals they serve.