

### 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.

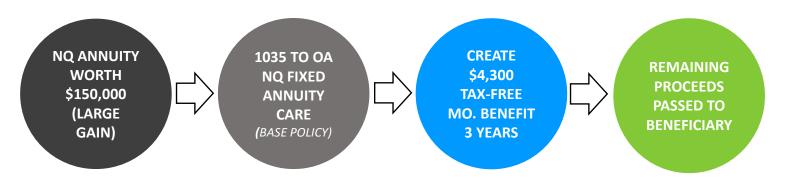
# CLIENT CONCERNS

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

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