



## **INSURANCE PORTFOLIO MANAGEMENT...THE PROACTIVE REVIEW OF ILIT ASSETS**

### **Course Description**

This presentation is designed specifically for advisors to benefit clients with existing comprehensive plans. It will enlighten you on the significant opportunities to enhance the client/advisor relationship through the proactive review of policies owned by Irrevocable Life Insurance Trusts. We will provide you the tools that you need to engage in dialogue with corporate and personal trustees. It is estimated that approximately one trillion dollars of life insurance is owned by ILITS today. More than 50% of these policies are not being proactively managed by the ILIT trustee.

We will explain to you how to effectively communicate with trustees, personal and corporate, and provide you with the tools that they need to proactively review, analyze and manage the assets which they are responsible for. In many cases, this will lead to significant new opportunities for the focused advisor who works with trustees and other professional advisors in a team approach to serve the needs of existing clients. We will walk you through six successful ILIT review engagements from 2005 and 2006. The outcomes are compelling.

If you are committed to the valuable client-centered benefit of insurance owned by life insurance trusts, you need to attend this presentation!!