

Insuring Philanthropic Clients – Simple & Powerful Charitable Strategies Using Life Insurance and Annuities (with Randy Huston, CFP)

Charitable tax and financial strategies can be powerful planning solutions for clients. When combined with the leveraging investment power of life insurance and annuities, the comprehensive benefits are impressive. However, the rules regarding the interplay of charitable planning with life insurance products are not well known. Moreover, the penalties for poor execution on either end can be financially devastating for the client. This presentation will provide the key rules of charitable trust planning and demonstrate real-life case studies that successfully integrated insurance and annuities into the plan.

Learning objectives:

1. Identify how to safely incorporate life insurance and annuities into a client's philanthropic goals
2. Determine the tax and financial benefits of integrated charitable planning
3. Discover how you can make life insurance/annuity proposals to your charitably-inclined clients