

Pension maximization

Client profile

Name: _____ Agent code: _____

Email: _____ MGA: _____

The pension maximization strategy using life insurance can help your clients gain death benefit protection while making the most out of a pension plan.

Help your clients capitalize on their pension plans

If your clients...

- Need death benefit protection and are considering retirement
- Are married, age 50 to 65
- Have a defined benefit pension plan
- Are seeking to help maximize monthly income
- Are prepared for the potential impact caused by loss of benefits for the surviving spouse that may be linked to the joint life option



... Use life insurance to provide financial protection and maximize pensions.

List the names of five clients who fit the above profile and whom you would like to help meet their life insurance needs and financial goals.

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____

Client name: _____	Age: _____	Gender: _____	Tobacco: Y/N	State: _____
Premium amount: _____	Retirement age: _____	_____	_____	_____