

Life Insurance Planning



[Life Insurance Planning_ 下载链接1](#)

著者:Leimberg, Stephan R./ Doyle, Robert

出版者:

出版时间:2007-11

装帧:

isbn:9780872189331

Discover proven methods for determining a client's life insurance needs and close more sales than ever before with the helpful hints throughout. Unique charts, checklists, and real-world examples help immediately apply skills and identify the

impact of new regulations on existing paradigms. Tools & Techniques of Life Insurance Planning features extensive coverage of 10 policy types with quick comparisons.

4th Edition offers expanded reviews of the latest:

Life settlements & insurable interest

Assets held by variable life insurance or variable annuities

Income & transfer tax consequences of life insurance

Variable annuities versus mutual funds

New split dollar regulations for old & new arrangements

always matching product to problem with revised formulas, worksheets and rules of thumb!

Guides through the process of evaluating existing life insurance plans and formulating new strategies. Provides a comprehensive introduction and focuses on substantive discussions and applications of each plan. Some techniques examined: buy-sell agreements; charitable planning; death benefit only plans; qualified/nonqualified plans; IRC Section 162 plans; key employee life insurance; roles of revocable and irrevocable trusts.

Authors simplify by defining Tools & Techniques; indicating when to use; analyzing advantages/disadvantages; identifying tax implications; addressing alternatives; calculating fees or other acquisition costs involved; selecting best client-based plans. The appendices consist of technical explanations of: generation skipping transfer taxation; treatment of modified endowment contracts and IRC Section 1035 exchanges; benefits income taxation; transfer for value rule.

Newly Revised delivering sweeping changes from COLI Best Practices Act of 2006, PPA of 2006, and TIPRA of 2006. Life Insurance, PACE, and CFP® CE Filed.

Chapters to feature: the top 12

How to Estimate the Insurance Need

Legal Aspects of Life Insurance

Variable and Variable Universal Life

Irrevocable Life Insurance Trusts

Key Employee Life Insurance

Accelerated Death Benefits and Viatical Settlements

Survivorship Life

Buy-Sell Agreements

Life Insurance in Qualified Plans

Section 162 Plans

Death Benefit Only (DBO) Plans

Special Policy Provisions and Riders

Delivers value at any knowledge level introductory, overview & review!

NOTE: Achieve 100% Correlation with CFP® Certification Examination Topics List when using Tools & Techniques of Life Insurance Planning, 4th Edition in combination with Tools & Techniques of Risk Management for Financial Planners, 2nd Edition. The Bundle of 2 is available for \$132.90. Use Product # 8080002.

Testimonials

In each of our books we had one major goal in mind: To create the single best source of up-to-date, pragmatic and transferable information on the topics you need to help others.

Stephan R. Leimberg, Lead Author of Tools & Techniques

作者介绍:

目录:

[Life Insurance Planning_ 下载链接1](#)

标签

评论

[Life Insurance Planning_ 下载链接1](#)

书评

[Life Insurance Planning_下载链接1](#)