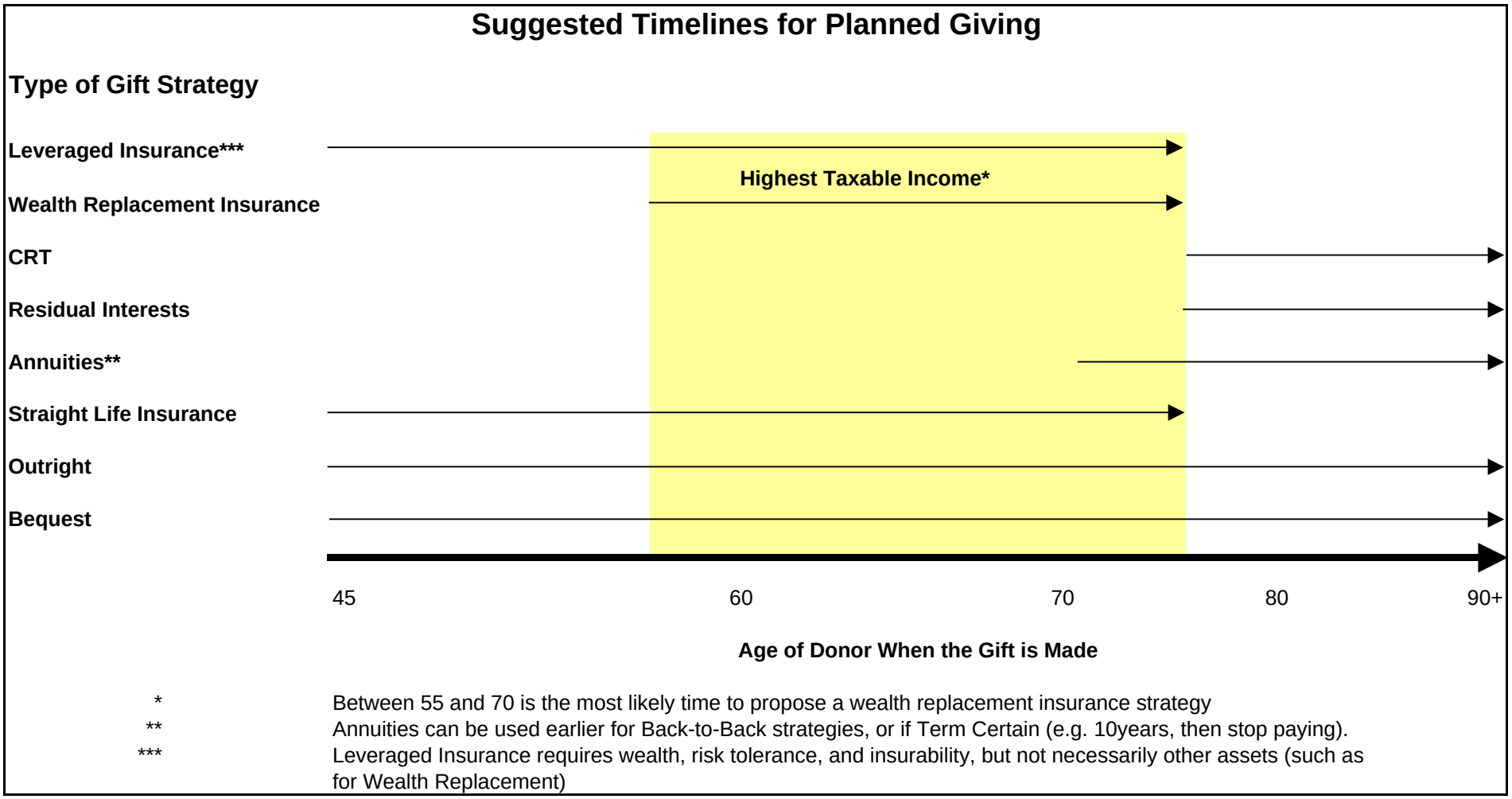
Suggested Timelines for Planned Giving



* Between 55 and 70 is the most likely time to propose a wealth replacement insurance strategy

** Annuities can be used earlier for Back-to-Back strategies, or if Term Certain (e.g. 10years, then stop paying).

*** Leveraged Insurance requires wealth, risk tolerance, and insurability, but not necessarily other assets (such as for Wealth Replacement)