Advanced planning strategies

Help meet clients' needs with goals-based solutions

Lincoln is here to help support you with solutions that are available to help meet your clients' needs and expectations. Let's start thinking about all the opportunities you have to build your business.

How many clients do you have who are:

- Professionals, executives or entrepreneurs seeking higher potentially tax-free retirement income?
- Not maximizing their income tax bracket while the Tax Cuts and Jobs Act ("TCJA") is in effect?
- Widows or widowers who are trust beneficiaries?
- Family business owners who want to pass the business to the next generation?
- Business owners who want to retain and reward key employees?
- Nonprofits seeking to retain and reward key personnel?
- Charitably inclined?

How many clients do you have who own:

- Concentrated stock positions that they want to pass to heirs?
- Large IRA accounts that will generate or are generating unneeded taxable distributions?
- Tax-deferred annuities that will pass to the next generation?
- Life insurance with a high cost basis and low cash value?
- Trust-owned life insurance no longer needed for estate tax?
- Assets they wish to gift to children or grandchildren before the sunset of the TCJA?

Ready to find a solution for your clients?

We're here to help.

Insurance products issued by:
The Lincoln National Life Insurance Company
Lincoln Life & Annuity Company of New York

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Not a deposit
Not FDIC-insured
Not insured by any federal government agency
Not guaranteed by any bank or savings association
May go down in value

When it comes to meeting your clients' unique planning needs, think Lincoln first.

Contact your Lincoln Representative or email us at AdvancedSales@LFG.com.

LincolnFinancial.com

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