



PUT YOUR TAX RETURN INTO LIFE INSURANCE!

With tax season around the corner, the looming question of what to do with your tax return money is on everyone's minds. One idea that many do not think about that can elevate your financial plan to the next level is cash value life insurance!

Imagine your premiums providing you with the life insurance protection you seek along with the upside potential of accumulating cash value from sky-high interest rates. Imagine that same policy ALSO offering downside protection of a 0% floor during volatile market years. This is where your tax return should go!

Below is a comparison of what a savings account versus life insurance can provide you:

Life Insurance	Savings Account
Upside potential for high growth returns, downside protective floor	Low return potential
Tax-free growth and tax-free distributions	Interest on money is taxable
Death benefit protection for loved ones	No death benefit
Premiums can be adjusted to account for amount of tax return	Monthly savings amount is flexible

Looking for more information? Reach out now!

