

CASE STUDY

Brian Smithson

CLIENT NAME

75

AGE

Stroke

MEDICAL IMPAIRMENT

\$2,000,000

DEATH BENEFIT

Universal Life

POLICY TYPE

\$900,000

LOAN OFFER

\$45,000

ADVISOR COMPENSATION



PAYMENT TO BENEFICIARY

Maturity in 12 Months	\$770,545
Maturity in 24 Months	\$532,667
Maturity in 36 Months	\$354,318

*Includes Fifth Season's interest rate of 15% and fees. The example is for illustration only, all Funds for Living advances are individualized. Actual terms and referral fees may vary.

“I am so pleased that my financial advisor suggested that I consider a life insurance loan. I did not know that this option even existed. I needed access to money to pay off some debt and I was hesitant to sell my life insurance policy because I wanted to leave my children money from my policy. This was the perfect solution for me!”

- Brian Smithson



Fifth Season Financial
Funds for Living

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