



Tread Lightly: Life Insurance Guide for the Affluent Client

Michael R Smith

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The scary truth is that many permanent life insurance policies will not pay out at the time of an insured's death. Even worse, many failed policies are caused by avoidable oversights.

TREAD LIGHTLY strives to protect your interests by providing the guides, checklists and background information that every consumer and client advocate must know to both successfully purchase and maintain a complex life insurance portfolio.

TREAD LIGHTLY is both an effective and efficient overview while being respectful of your time. Many will be able to complete TREAD LIGHTLY in less time than the average flight

Our message is simple: there is no "one-size-fits-all" approach to life insurance, and the key to success is consumer education.

TREAD LIGHTLY is not just a life insurance guide for the affluent client, but also a resource for any buyer or client advocate involved in the purchase or maintenance of large insurance policies. If you are a licensed life insurance advisor, we believe that TREAD LIGHTLY is a unique way to communicate with your clients while showing them that you are committed to providing industry leading service and explanation. Other professionals who will benefit from TREAD LIGHTLY include: estate planning attorneys, business lawyers, CPAs, trust offices, members and employees of family offices, insurance agents and anyone else acting in a fiduciary capacity regarding life insurance.

To protect your financial future and achieve our definition of policy success, read TREAD LIGHTLY today.

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