



PLAN A

DON'T CHOOSE BETWEEN PROTECTING YOUR FAMILY OR GROWING YOUR WEALTH, DO BOTH.

You want your money to do a lot for you.
Plan A is a safe and sophisticated yield enhancement strategy
that allows you to unlock the equity in your life.
You get the vital protection you need for your family's wellbeing
while still cultivating your future prosperity



PLAN A LETS YOU USE EVERY DOLLAR TWICE

Plan A leverages your permanent life insurance policy to secure financing for other growth strategies. You combine the need for permanent life insurance protection without compromising the immediate investments that enrich your current wealth and transform your legacy. As well, unlocking the equity in your life eliminates the opportunity cost of dollars, giving you both straightforward access to your cash and tax-free benefits.

PLAN A WORKS JUST LIKE A MORTGAGE

- 1 The bank funds the premium for your permanent life insurance policy.
(Decision time: If the bank funds the premium, the interest expense is not tax deductible but if you fund the premium-it is.)
 - 2 Assign the policy to the bank to secure financing.
(Additional collateral may be necessary.)
 - 3 Re-invest the funds in other business ventures.
- Repeat steps 1 through 3 annually.
(Be enormously pleased with yourself for using every dollar twice.)



Let's
Chat
Today

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*Mutual Funds provided through Carte Wealth Management Inc.
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