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Falling IUL Cap Rates got you down? We’ve pivoted to an alternative strategy that gives the client an “out” if their indexing strategy is no longer delivering the performance they hoped for. Whether based on market conditions, falling Cap or Participation rates, this simple change to how we approach case design puts advisors and clients back in control of their life insurance assets without giving up the downside protection that makes IUL so appealing.

Interested in learning more? Let’s chat!

#lifeinsurance #IndexedUL, #fallingcaprates