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It’s tempting to use an “apples to apples” approach when considering the premium deposit used to fund an Asset-Based LTC solution. Given the availability of a tax-free 1035 exchange when an annuity is the source of funds, it’s critical to take any tax taxes due on the surrender of the annuity into account when determining the amount available to fund the strategy. Fortunately, taking the impact of taxes into account in these scenarios involves only two additional pieces of data and a bit of math.

Interested in learning more? Let’s chat!

#assetbasedltc #annuities #1035exchange