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As clients age, they can find themselves in an enviable position: Their insurance assets have done what they were designed to do: Provide protection for their loved ones. In the process, they often amass significant policy cash value. As the client’s needs change, however, this insurance asset may not be flexible enough to meet their current needs. In most cases, client’s needs evolve from simple income replacement to a more diverse set of objectives.

Fortunately, there are a handful of insurance companies that offer “all seasons” product portfolios and the ability to “split” incoming 1035 exchanges upon receipt.

Interested in learning more? Contact me today!

#lifeinsurance #retirementplanning #1035exchange