

# Leveraged Planning<sup>®</sup> Solutions Prospect Guide

OFFERED BY GLOBAL FINANCIAL DISTRIBUTORS, A SYNOVUS BANK COMPANY



## To Assess if Life Insurance Premium Financing could be an appropriate solution for your client

For over 20 years, Global Financial Distributors (GFD) has provided a broad range of business owner and high net worth clients with access to funding for their life insurance needs. When it comes to identifying an ideal candidate for life insurance premium financing, the following questions can help guide a conversation with your client.

1. What is the purpose of the life insurance? (circle all that apply)

Estate Tax Exposure      Funding Buy-Sell      Income Replacement      Other \_\_\_\_\_

2. If you've determined how much death benefit you will need, list it here: \_\_\_\_\_

3. On a scale of 1-10 (with 10 being completely comfortable), how comfortable are you with using leverage to purchase an asset? \_\_\_\_\_

4. What is your overall estimated net worth? \_\_\_\_\_ 5. What is your annual income? \_\_\_\_\_

6. Who will be the borrower? (circle all that apply)      Individual(s)      Trust(s)      Business(es)

7. Who will be the insured(s)? \_\_\_\_\_

8. What is the annual budget for this insurance? \_\_\_\_\_

9. Do you have liquid assets that can be used as collateral?      Yes      No

10. What is your annual ability to service interest (if there is a limit due to cash flow considerations or annual gifting, please explain)? \_\_\_\_\_

11. Are there any other considerations that should be taken into account? \_\_\_\_\_

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