



THE ESTATE PLANNER'S DILEMMA

**Navigating Presidential Plans
and Long-Term Strategies**



DOWN THE ESTATE PLANNING RABBIT HOLE

As you journey down the path of estate planning, it's akin to tumbling down the rabbit hole, where each twist and turn presents new challenges and opportunities. Just like Alice navigating Wonderland, you must be prepared for the unexpected and approach each decision with curiosity and foresight.

If you peer through the looking glass of President Trump's Tax Proposal, you might find yourself feeling like the Cheshire Cat, grinning at the prospect of a delayed estate tax liability. However, beware the Queen of Hearts in President Biden's plan, whose gaze seems fixed upon your wealth like a vorpal blade.

(Tracking 2024 Presidential Plans)





GET AHEAD OF THE COMPETITION

But fear not, for even in this topsy-turvy landscape of shifting policies and pendulum swings of power, a savvy planner like yourself can be the Mad Hatter at the tea party, serving up thoughtful long-term strategies that defy the march of time.

In a world where advisors and consultants come and go like characters in a caucus race, why let your clients wander off with a White Rabbit when they could be guided by the wisdom of the Caterpillar atop his mushroom?



LIFE INSURANCE, ANYONE?

And when it comes to underwriting, our process is as precise as the White Queen's measurements for her jam tarts. Even if your clients partake in the occasional hookah session, rest assured that preferred pricing is still within reach, much like the elusive White Rabbit himself.





LET'S NOT BE LATE TO THE PLANNING PARTY!

Settle in with a cup of tea and let's discuss the wonderland of solutions we're implementing now, ensuring that your clients' financial futures remain as secure as the Mad Hatter's hat.

