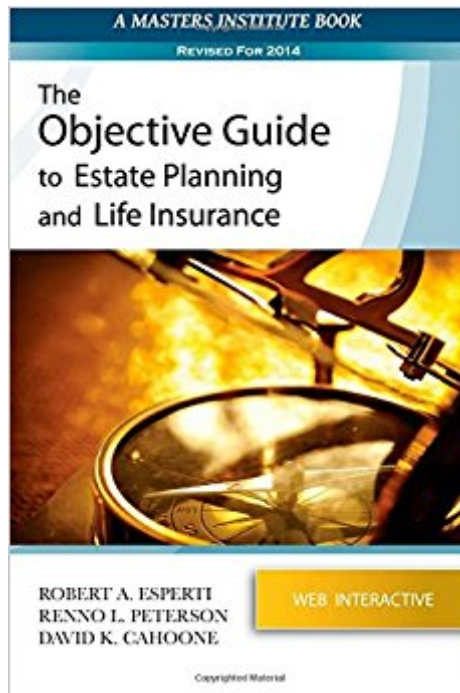




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The Objective Guide To Estate Planning And Life Insurance



Synopsis

Revised for 2014 Life insurance, just as any other financial tool, should only be used when there is an objectively-defined need. Nationally preeminent estate planning attorneys and authors, Robert A. Esperti, Renno L. Peterson, and David K. Cahoone, wrote the Objective Guide to help professional planners and their clients determine if life insurance is appropriate to meet real rather than illusory planning needs. They are the authors of the best-selling book, *Loving Trust*, as well as the recently released *Protect and Enhance Your Estate*. They have written 29 books for professionals and the public. For more information, go to www.espertipetersoncahooone.com. The Objective Guide is unique in that it incorporates the best of the Internet and the printed word. Clients, working with their advisors, can obtain access to professionally created interactive tools, including the Life Insurance Diagnostic Test[®], Life-Dat[®], Life-Calc[®] and Life-Retire-Plan Calc[®]. The Guide begins with 20 case stories, which represent 20 of the most common family situations in which life insurance is the best "or only" solution to the planning facts. A vast majority of clients will recognize themselves, in whole or in part, in these case stories. Part Two of the Guide introduces and explains the Life-Dat[®], an on-line test which takes only a few minutes to complete. It immediately generates a Results Report that determines which of the case stories, if any, applies to him or her. The client and his or her advisor can then read the suggested case stories and decide if they reflect the client's situation. If so, the client and advisor can then take the appropriate next steps. Part Three explains the two on-line calculators. Assuming the Life-Dat[®] suggested that life insurance was applicable, Life-Calc[®] can help clients determine how much life insurance they need. While many advisors have access to their own calculators, Life-Calc[®] is a simple and useful method to begin the process of determining how much life insurance coverage is appropriate. The Life-Retire Plan Calc[®] is for wealthier clients who have retirement plans that may be useful in providing funds for life insurance premiums. Part Four is a helpful survey of estate planning. For those who have not yet planned their estates, and even for those who have planning in place, these chapters have some eye-opening facts that will help in understanding, implementing, and improving estate planning. While the Objective Guide alone will be helpful for many clients and advisors, in order to take full advantage of the power of the Guide, advisors must first be allowed access to the Life Insurance Diagnostic Test[®]. Please go to www.epcmethod.com to learn how to subscribe to the Life Insurance Diagnostic Test[®]. (0914)

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