



Who do you know?

Think of your clients' needs.

corebridge
financial

Who would be good candidates for
a specific solution or a general review?

Long Term Illness Expenses

WHO DO YOU KNOW WHO...

- May have owned a standalone long-term care policy with increasing premiums?
- Has extra discretionary income and a net worth of \$250,000 or more (excluding primary residence)?
- Is concerned about threats to their future financial stability?
- Is currently providing financial support to parents, or knows someone that is?
- Knows someone who has been in a nursing home or needed attentive medical care?

Major Life Changes

WHO DO YOU KNOW WHO...

- Has had a major life change:
 - Marriage, or divorce?
 - New child/children, or child off to college?
 - New home, or adult child return home?
 - New job, or new business?

Legacy Planning

WHO DO YOU KNOW WHO...

- Is concerned about potential long-term care expenses?
- Has an interest in using their assets to guarantee inheritance to their children?
- Lives a thrifty life to maintain/enhance the value of their legacy?
- Looks for ways to provide each child an even share of the legacy?
- Has excess assets in their portfolio that they have put aside for their legacy?
- Has an interest in leaving a substantial charitable donation?

Tax Diversification

WHO DO YOU KNOW WHO...

- Is highly committed to his/her financial future?
- Help to manage the tax treatment of retirement assets—resulting in the potential for higher net income during retirement years.
- Wants diversification and tax-favored growth in their plan?
- Is between the ages of 30 - 55 and generally healthy?
- Currently owns or has recognized a need for additional life insurance?

Small Business

WHO DO YOU KNOW WHO...

- Wants to keep the business “family owned and operated” after their death?
- Wants to help ensure the business can be sold for fair market value in the event of their death, disability, or other unexpected event?
- Wants to provide supplemental retirement benefits for themselves or other key employees?
- Wants to provide their children with equal inheritance even if one or more of their children will not be involved in the future of the business?
- Could face significant costs to replace key employees?

Policies issued by **American General Life Insurance Company (AGL)**, Houston, TX except in New York, where issued by **The United States Life Insurance Company in the City of New York (US Life)**. **AGL does not solicit, issue or deliver policies or contracts in the state of New York.** Guarantees are backed by the claims-paying ability of the issuing insurance company and each company is responsible for the financial obligations of its products. Products may not be available in all states and features may vary by state.

All companies above are wholly owned subsidiaries of Corebridge Financial, Inc. Corebridge Financial and Corebridge are marketing names used by these companies.

This material is general in nature, was developed for educational use only, and is not intended to provide financial, legal, fiduciary, accounting or tax advice, nor is it intended to make any recommendations. Applicable laws and regulations are complex and subject to change. For legal, accounting or tax advice consult the appropriate professional.

© Corebridge Financial, Inc. All rights reserved.

AGLC112292 REV0125

FOR FINANCIAL PROFESSIONAL USE ONLY. NOT FOR PUBLIC DISTRIBUTION.