

MEET NANCY

GOLDEN STRATEGY REALIZED:
A 77-YEAR-OLD'S LUCRATIVE
LEAP INTO LIFE SETTLEMENTS



REVENUE REALIZATION



\$40K
LOWEST BID



240K
HIGHEST BID



240K
SOLD FOR



\$24,200
AGENT
COMMISSION

THE CASE SNAPSHOT



Strategic Estate Replanning Success: A proactive approach to estate planning by Nancy, a 77-year-old woman, consulting with her advisory team, resulted in the strategic sale of an unnecessary \$500,000 policy to better support her estate goals.

THE PIVOTAL POINTS



1

POINT ONE

Life settlements are a crucial tool for wealth preservation and prudent policy exit strategies.

2

POINT TWO

Experienced brokers are pivotal in negotiating the highest settlement offers.

3

POINT THREE

Life settlements offer a dual benefit: providing clients with a cash windfall and allowing agents to earn a substantial commission.



Golden Strategy Realized: A 77-Year-Old's Lucrative Leap into Life Settlements



THE ADVERSITY ANALYSIS ▼

The challenge began when incomplete medical records threatened the valuation of Nancy's life settlement. With critical health information missing, securing a favorable offer seemed daunting. The Asset Life Settlements team embarked on a meticulous search for clarity, facing rejections and roadblocks. Persistence and strategic advocacy became our guiding principles as we sought to unveil the full medical history that would accurately reflect the policy's value.

THE POLICYHOLDER PORTRAIT ▼

Client Profile of Persistence: Nancy, A 77-year-old female with a Standard UL Policy valued at \$500K and an 8-9 year life expectancy, facing an annual premium of \$9,664, and a CSV of \$4,141, demonstrates the powerful impact of a well-informed life settlement decision.

THE SETTLEMENT STORY ▼

The story of Nancy, her life settlement unfolds with strategic patience and expert negotiation, leading to a victorious outcome. Rejecting initial lowball offers and continuing the search for comprehensive medical records, our resolve was tested. However, the discovery of crucial cardiologist records reinvigorated the bidding process, resulting in a dramatically improved offer of \$240,000. This settlement not only met the Nancy's financial goals but also highlighted the transformative impact of informed decision-making and steadfast advocacy in the face of adversity.

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As brokers, it's our fiduciary duty to negotiate the highest value for your policy. Call us at 855-768-9085 to request an immediate estimate of your client's policy.