BORDEN HAMMAN

BUSINESS PLANNING STRATEGIES

EXECUTIVE BONUS PLUS

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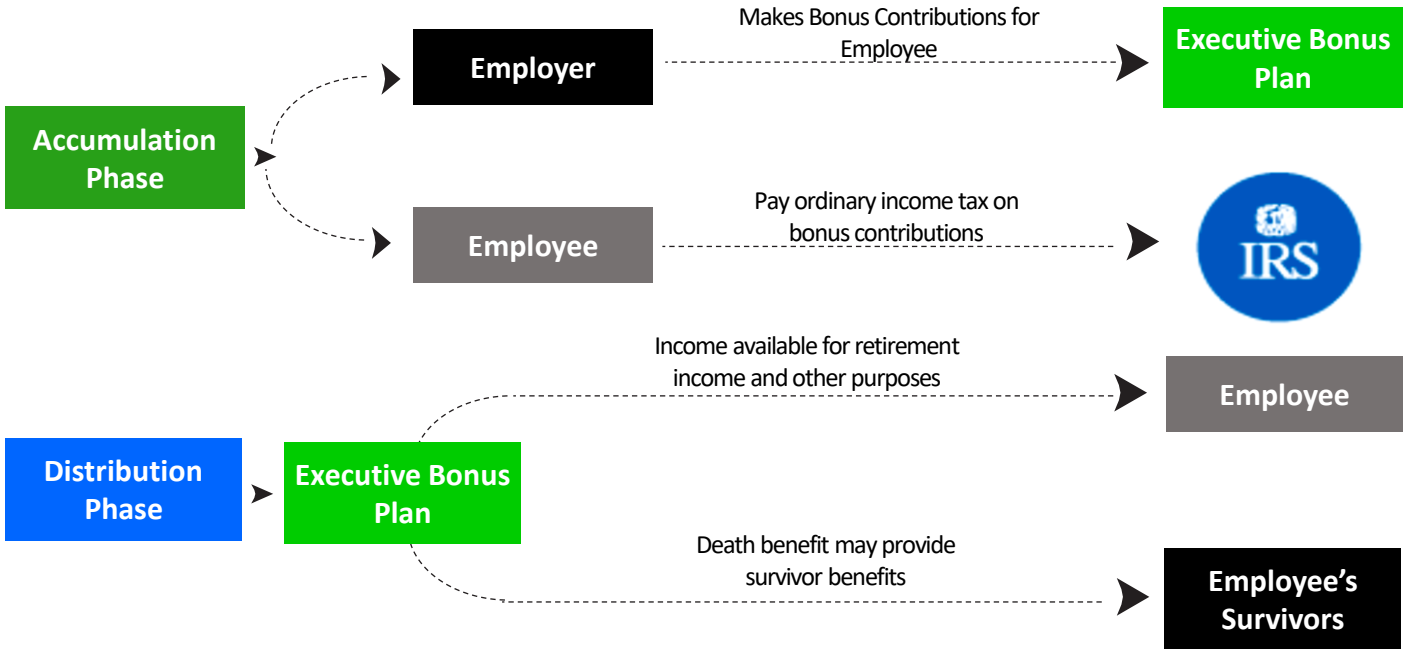
Create an offering of benefits for your key personnel that they value.

DELIVER MULTIPLE BENEFITS, AND HELP YOUR KEY PERSONNEL SAVE FOR THEIR FUTURE.

EXECUTIVE BONUS PLUS - HOW IT WORKS



WHAT FINANCIAL PROFESSIONALS NEED TO KNOW

1. **Save more:** The employee can save more for retirement; above the limits of a qualified plan, such as a 401(k).
2. **Receive multiple benefits:** In addition to retirement income, the plan provides access to funds to address unexpected events like disability, Long-Term Care, chronic illness, or other financial needs.
3. **Enhance financial security:** The employee's family may receive tax-free benefits at time of employee's death.
4. **Own the policy:** The employee owns the policy but must stay with the employer to be eligible for the bonus.
5. **Pay potential taxes:** An additional tax may be due if the bonus doesn't cover all of the employee's income tax and can be partially, or fully, offset with an added employer bonus.

Most insurance policies contain exclusions, limitations, reductions of benefits, and terms for keeping them in force. Ask your financial professional to provide you with costs and complete details. Guarantees are based on the claims-paying ability of the issuing insurance company. AIMCOR Group, LLC is not an insurer and does not issue contracts for coverage. This material is being provided for informational or educational purposes only and does not take into account the investment objectives or financial situation of any client or prospective clients.

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