

Loan-Based Private Split Dollar Using Indexed Survivor UL

Presented By: [Licensed user's name appears here]

Lender and Trust Grantor: Tom Anthony

Illustration of Policy Values Funding the Plan

Borrower and Policy Owner: Anthony Family Trust

Insureds: Tom Anthony/Donna Anthony

		Indexed Survivor UL Interest Rate 7.00%	Initial Premium 360,000	Initial Policy Death Benefit 10,000,000		
Year	M/F Ages	(1) Policy Premium	(2) Pre-Tax Policy Cash Flow	(3) Year End Accum Value*	(4) Year End Cash Value*	(5) Death Benefit
1	55/50	360,000	0	326,263	0	10,326,263
2	56/51	360,000	0	675,258	283,658	10,675,258
3	57/52	360,000	0	1,048,661	692,661	11,048,661
4	58/53	360,000	0	1,448,160	1,127,760	11,448,160
5	59/54	360,000	0	1,875,577	1,590,777	11,875,577
6	60/55	0	0	1,970,755	1,721,555	11,970,755
7	61/56	0	0	2,072,513	1,858,913	12,072,513
8	62/57	0	0	2,181,290	2,003,290	12,181,290
9	63/58	0	0	2,297,566	2,155,166	12,297,566
10	64/59	0	0	2,421,826	2,315,026	12,421,826
11	65/60	0	0	2,569,600	2,498,400	12,569,600
12	66/61	0	0	2,728,358	2,692,758	12,728,358
13	67/62	0	0	2,934,576	2,934,576	12,934,576
14	68/63	0	0	3,156,075	3,156,075	13,156,075
15	69/64	0	0	3,393,932	3,393,932	13,393,932
16	70/65	0	0	3,649,240	3,649,240	13,649,240
17	71/66	0	0	3,923,049	3,923,049	13,923,049
18	72/67	0	0	4,216,466	4,216,466	14,216,466
19	73/68	0	0	4,530,553	4,530,553	14,530,553
20	74/69	0	0	4,866,330	4,866,330	14,866,330
21	75/70	0	0	5,224,617	5,224,617	15,224,617
22	76/71	0	0	5,605,991	5,605,991	15,605,991
23	77/72	0	0	6,010,887	6,010,887	16,010,887
24	78/73	0	0	6,439,306	6,439,306	16,439,306
25	79/74	0	0	6,890,753	6,890,753	16,890,753
26	80/75	0	0	7,364,882	7,364,882	17,364,882
27	81/76	0	0	7,861,015	7,861,015	17,861,015
28	82/77	0	0	8,377,807	8,377,807	18,377,807
29	83/78	0	0	8,912,629	8,912,629	18,912,629
30	84/79	0	0	9,461,845	9,461,845	19,461,845
		1,800,000	0			

*This is an InsMark supplemental illustration for indexed survivor universal life. In an actual presentation, this footnote refers to an accompanying basic illustration from a specific life insurance company with important details, caveats, and guarantees.

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Indexed Survivor UL
 Interest Rate
 7.00%

Initial
 Premium
 360,000

Initial Policy
 Death Benefit
 10,000,000

Year	M/F Ages	(1) Policy Premium	(2) Pre-Tax Policy Cash Flow	(3) Year End Accum Value*	(4) Year End Cash Value*	(5) Death Benefit
31	85/80	0	0	10,019,513	10,019,513	20,019,513
32	86/81	0	0	10,580,488	10,580,488	20,580,488
33	87/82	0	0	11,137,306	11,137,306	21,137,306
34	88/83	0	0	11,679,591	11,679,591	21,679,591
35	89/84	0	0	12,197,709	12,197,709	22,197,709
36	90/85	0	0	12,678,542	12,678,542	22,678,542
37	91/86	0	0	13,110,457	13,110,457	23,110,457
38	92/87	0	0	13,478,812	13,478,812	23,478,812
39	93/88	0	0	13,767,522	13,767,522	23,767,522
40	94/89	0	0	13,959,869	13,959,869	23,959,869

1,800,000 0

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