



Below is a view of the Workbook Main Window from the InsMark Illustration System used for Blog #153 along with a brief description of each illustration.

Client Workbook Edit Tools Options Help

Workbook Main Window

Proposals for the workbook: Blog #153

| Proposal Description | Sales Concept | Policy Data (if applicable) | | | |
|-------------------------------|------------------------|-----------------------------|-----------------|---------------|-----------------|
| | | Policy Notation | Initial Premium | Death Benefit | Name of Product |
| 1. Solo 401(k) vs. IUL | Investments vs. Policy | Blog #153 | \$72,000 | \$4,891,632 | Indexed SUL |
| 2. Solo 401(k) vs. IUL 70% TB | Investments vs. Policy | Blog #153 | \$72,000 | \$4,891,632 | Indexed SUL |

Proposal:

- New...
- Copy
- Edit
- Delete
- Preview
- Print...
- Source Data
- Review

Workbook file name: Blog #153.!!!

Proposal 1: A couple, both of which qualify for the maximum contribution of \$60,000 to a Solo 401(k) plan, are shown a Solo 401(k) compared to the after tax cost of that \$60,000 (each) used for premiums for an indexed survivor universal life policy.

Proposal 2: Same as Proposal 1 except an increase in tax brackets at retirement is assumed (in response to the widespread belief that the federal deficit of the U.S. will require such increases).