



Symposium 2016 What's New with InsMark

New Capacity To Be Announced at the Symposium

- ◆ Section 6166 to Fund Estate Taxes available in the InsMark Illustration System;
- ◆ Grantor Trusts available in Wealthy and Wise;
- ◆ Sale of Asset to Grantor Trust Funded by Promissory Note available in Wealthy and Wise;
- ◆ Loan Interest Reserve Account added to Premium Financing System for level funding of loan interest;
- ◆ Short-term and mid-term Applicable Federal Rates added to Loan-Based Split Dollar System and Leveraged Compensation System;
- ◆ Design-your-own-schedule¹ of loan interest rates available in all Loan-Based Split Dollar Plans;
¹ Must be at least equal to the short-term rate.
- ◆ Multiple Year Matching Values Reports – all Systems;
- ◆ Using Life Insurance to Fund Repayment of Student Loans available in the InsMark Illustration System.