Use IRA Dollars to Fund Asset Care

20 percent income base bonus

Asset Care Annuity Funding Whole Life is a deferred fixed-interest annuity with an income rider. The income rider allows the annuity to fund the underlying whole life policy over 10 years.

Did you know that when you transfer a portion of your clients qualified money into this funding option, they receive a bonus applied to their income base of up to 20 percent? This bonus provides extra value for your cli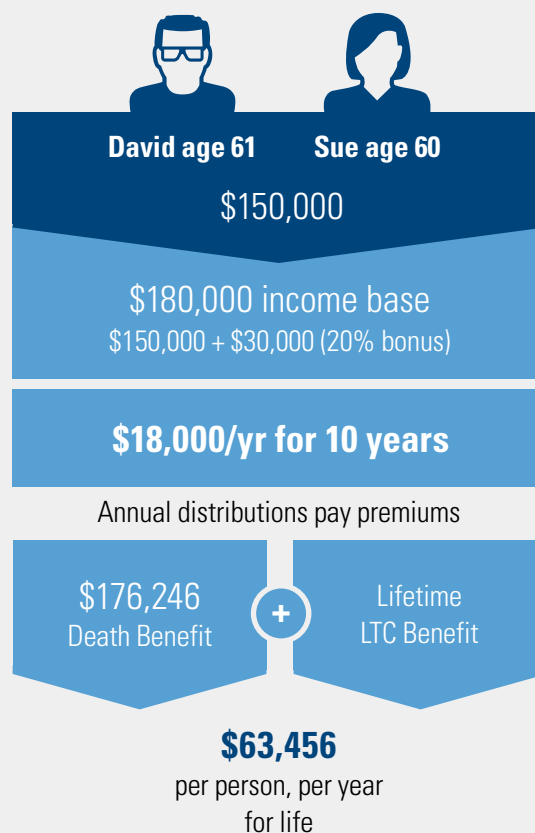ents, and you can help make sure their protection lasts as long as they need it with the Lifetime Continuation of Benefits option.

Consider this hypothetical example:

David, 61 and Sue, 60; Married couple, non-smokers in good health

David and Sue can reposition $150,000 of their qualified funds into the Asset Care Annuity Funding Whole Life option. Their 20% income base bonus results in $180,000 to purchase a whole life face amount of $176,246. Then, using the income rider, the annuity disburses $18,000 per year for 10 years.

That $150,000 qualified annuity generates a guaranteed annual income of $63,456 per person to help pay for qualifying LTC expenses... **FOR LIFE!**

David age 61   Sue age 60
$150,000

$180,000 income base
$150,000 + $30,000 (20% bonus)

$18,000/yr for 10 years
Annual distributions pay premiums

$176,246 Death Benefit + Lifetime LTC Benefit

$63,456
per person, per year
for life

Note: All numeric examples and any individuals shown are hypothetical and were used for explanatory purposes only. Actual results may vary.

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Products issued and underwritten by The State Life Insurance Company® (State Life), Indianapolis, IN, a OneAmerica company that offers the Care Solutions product suite. Asset Care Form number series: ICC18 L302, ICC18 L302 JT, ICC18 R537, ICC18 R538, ICC18 R532, ICC18 R533, ICC18 SA39 and ICC18 R540. Not available in all states or may vary by state. All factors should be weighed before replacing an existing life insurance or annuity.

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