



Recruit. Retain. Retire.

As a nonprofit organization, you have a unique set of needs when it comes to benefiting your employees. Let us help.

Our objective is to meet your needs:

- To create a program where the nonprofit organization (NPO) can be highly selective regarding which executives are covered. Life insurance funding arrangements can be an effective strategy for attracting and retaining valuable key executives.
- To help ensure that the NPO implements the most cost effective plan possible.
- To create plans tailored to the individual needs of each NPO.

Possible solutions:

- **Collateral Assignment Split-Dollar Life Insurance** is an effective strategy for attracting and retaining valuable key executives. The NPO is reimbursed for premiums loaned with interest at the times and on the terms that are specified in the underlying split-dollar agreement.
- **457(f) Plans** comprise of an agreement between the NPO and the employee to pay income in the future. This income can be tax deferred.
- **Section 162 Bonus Plan** is personal life insurance funded by the NPO. An arrangement is made where the NPO pays bonus compensation to selected employees in the form of premium payments on the employee's personally owned life insurance policies.

Contact us for a complimentary review.

For more information, contact:

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