

# Why Look for Captive Clients?



## RETENTION & DEFENSE

Prepare to defend your territory! If you have clients that are “Right Fit” candidates for 831 (b) Captives, someone **will** approach them with this idea. You can keep the upper hand by being on top of it first.



## LIFE INSURANCE

Life insurance can be financed out of Captives with your clients paying interest only towards policy premiums. That means large amounts of life insurance can be obtained for pennies on the dollar. The average annual premium for Captive owners is over \$190K.



## TRUST BUILDING

The tax savings and wealth transfer potential associated with 831 (b) Captives can be enormous. This kind of foresight is what will separate you from every other insurance agent that “Right Fit” clients have ever met. A Captive could be the keystone of a long-lasting relationship as your clients’ most trusted advisor.

“ Being able to present Captives to my clients set me apart from all other competitors and helped me **earn an extra six figures** in 2012. ”

**CHUCK B.**  
P&C Insurance Agent

**DAVID G.**  
P&C Insurance Agent

“ The Feasibility Study let us know all of the gaps in my clients coverage, and it didn’t hurt that he **saved \$750,000** in taxes. I can’t wait to do the next one. ”

“ Forming a Captive was **the best financial decision** that I have ever made. ”

**ALAN G.**  
Oil & Gas Industry Executive