

At One Resource Group we assist you with not only annuity quotes but estate planning and retirement income concepts.

Let take a look at one of our case studies:

Bob has an IRA that is worth \$500,000 dollars. Bob has made plans to retire in 5 years. At this point in his life, Bob has will need an income of \$2,400 per month. How should he invest for the future?

Let me show you how:

If Bob would take \$205,000 and invest in a 5 year guaranteed deferred annuity paying a 4% interest rate, within the 5 years this investment will grow to \$250,304.

At that time, this contract can be annuitized or transferred to a 10-year period certain annuity. This account should generate the \$2,400 per month for the next 10-years.

By funding the above mentioned account, \$295,000 will be able to be invested for long term growth. At an 8% rate of return you will have \$975,541 in 15-years.

A portion of the \$975,541 can be allocated to another income generating investments depending upon your clients needs at the time.

Utilizing this strategy you will earn a commission on the initial amount allocated to the deferred annuity (Approximately \$8,200 commission) then possibly again if transferred to an immediate annuity for a 5-year period certain time frame (\$8,850 commission).

Please give us a call so that we can show you how to provide an income that your client can't out live and also grow the principal back for your client.

Disclaimer:

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