



DESIGN TIME: 7/20 12:30 EST

Concentrated Stock Diversification Strategy

Do you have clients who own a lot of stock in one company? As the saying goes, “Don’t put all your eggs in one basket.” Too much of any one company’s stock increases exposure to company specific risk and stock price volatility. Diversification is important.

Leveraging a portion of a concentrated stock portfolio with life insurance can immediately increase wealth for the next generation. It can also help you diversify a portfolio containing a concentrated stock position.

Benefits of diversifying a concentrated stock position with life insurance include:

- A non-correlated death benefit
- Increased predictability of value
- Potentially reduced exposure to price volatility

Join us on July 20, 2010 @ 12:30 EST as we explore Concentrated Stock Diversification Strategies Presented By: Daniel K. Worth, Life Internal Sales Consultant, Lincoln Financial Distributors

DesignIt Training is offered by the LFN Planning Department. Join us in sharing life insurance strategies and designs with LFN producers.

In order to maximize the number of attendees that are able to participate, please attempt to listen to the presentation through your computer’s speakers.

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