

Referrals

“a customer’s ultimate stamp of approval”

Referrals are the sincerest form of appreciation. My business is built on trust, confidence, and satisfaction in the products and services I provide. When you, a client, take the time to refer a friend, neighbor, or acquaintance, I know I’ve done my job.

Do you know anyone who...

May have money set aside to pass on to their family, friends, or even a charity?

Would like to increase the amount of money earmarked for their heirs?

Would like to pass on their wealth income tax-free and possibly avoid probate hassles?

Want to pass on a “guaranteed” amount to their heirs or philanthropic organization?

Want to leave a significant financial gift as a legacy?

If “YES”, please take a moment to tell me about anyone who might benefit from my services.

NAME: CONTACT PHONE NUMBER:

ADDRESS: CITY:

STATE/ZIP: EMAIL ADDRESS:

NAME: CONTACT PHONE NUMBER:

ADDRESS: CITY:

STATE/ZIP: EMAIL ADDRESS:

NAME: CONTACT PHONE NUMBER:

ADDRESS: CITY:

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ADDRESS: CITY:

STATE/ZIP: EMAIL ADDRESS:

The policy’s guaranteed minimum death benefit is equal to the initial specified amount as defined in the policy and is guaranteed for the lifetime of the insured, assuming no loans, withdrawals or accelerations of the death benefit are taken.

Americo Financial Life and Annuity Insurance Company is authorized to conduct business in the District of Columbia and all states except NY and VT. Lifetime Legacy (Policy Series 258), the Accelerated Benefit Payment Rider (Rider Series 2149) and the Accidental Death Benefit (Rider Series 2169) are underwritten by Americo Financial Life and Annuity Insurance Company (Americo), Kansas City, MO and may vary in accordance with state laws. Some products and riders may not be available in all states. Certain restrictions apply. Consult contract and riders for all limitations and exclusions. Neither Americo Financial Life and Annuity Insurance Company nor any agent representing the company can give legal or tax advice. Please consult a qualified professional regarding the information and concepts contained in this material. Lifetime Legacy may be designated as a Modified Endowment Contract (MEC). Distributions of gain are subject to income taxation rules and IRS early distribution penalties. Please consult your tax advisor for further details.