

Life Settlements: Overview & Insights

Buckeye Life Resources

BLR offers one hour of **continuing education*** in virtual or in-person format at no cost to you.

The overarching **purpose** of the course is to educate attendees about life settlements (i.e., the sale of in-force life insurance in the secondary market) in a meaningful and forthright way.

Among other **topics**, the presentation addresses these questions:

- How are life settlements relevant to your practice, and when should they be considered?
- How might life settlements be another source of revenue for your organization?
- What are the advantages and disadvantages of life settlements?
- What are important considerations and best practices for sellers during the course of a sale?

The program is well-suited for the following **practioners**:

- Financial advisors
- Insurance specialists
- CPAs
- Estate planning attorneys
- Trust administrators
- Development & gift planning officers

Please contact **Todd Everson** to request a course outline or schedule a presentation date.

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SEEN
ON**

NAIFA Cleveland • Cleveland-Akron Financial Service Professionals
Cleveland Metropolitan Bar Association • NAIFA Cincinnati
Columbus Bar Association • North Coast Estate Planning Council
Medina County Estate Planning Council • BSA Annual Estate Planning
Seminar • Northern Ohio Charitable Gift Planners • Various
legal, financial & insurance organizations.

* The program is already accredited by the Ohio Department of Insurance. It has also been approved by the Supreme Court of Ohio (SCO) for continuing legal education in the past, but the SCO will only authorize programs on a one-off basis *after* they have been scheduled. Similarly, the course has been approved for CFP, CPA, CPE and CFRE credit.