

**From:** OneAmerica <dj.mormile@oneamerica.com>  
**Sent:** Tuesday, August 22, 2023 10:31 AM  
**To:** Resource Support  
**Subject:** Let's reposition your client's IRA while they are still healthy.

**Categories:** Bulletins



## Reposition IRA Dollars for Tax Advantages and Solid Leverage.



### Zoom Replay- Qualified Dollar Solutions for LTC Planning

Clients with most of their money in IRA's, 401k's, 403b's or even old Annuities? Click here to see how we can help.

[Click to Replay](#)

THE STATE LIFE INSURANCE COMPANY  
CARE SOLUTIONS

### Use IRA Dollars to Fund Asset Care®

Sales idea: 25% income base bonus

Asset Care Annuity Funding Whole Life is a deferred fixed-interest annuity with an income rider. The income rider allows the annuity to fund the underlying whole life policy over 10 years.

Did you know that when you transfer a portion of your client's qualified money into this funding option, they receive a bonus applied to their income base of up to 25%? This bonus provides extra value for your client, and you can help make sure their protection lasts as long as they need it with the Lifetime Continuation of Benefits option.

Consider this hypothetical example:

David, age 61	Sam, age 60
\$150,000	\$150,000
\$182,250 (income base) \$150,000 + 21% (20% bonus)	\$182,250 (income base) \$150,000 + 21% (20% bonus)
\$118,750/yr for 10 years	\$118,750/yr for 10 years
Annual distribution pay premium \$118,750 cash benefit	Annual distribution pay premium \$118,750 cash benefit
\$19,732 per person, per year for life	\$19,732 per person, per year for life

**Note:** All numeric examples and any individuals shown are hypothetical and were used for exploratory purposes only. Actual results may vary.

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### Funding LTC with an IRA- Sales Idea Flyer

Curious about how to reposition unused IRA dollars to fund future care costs? OneAmerica has a Solution! with a 25% BONUS

[Download the Sales Strategy](#)