

New York Trust & COVID-19



Engaging with our
clients SAFELY!

Our state-of-the-art approach to client connectivity has allowed us reach to every hamlet in America to create enduring and tax-beneficial family legacies.

We were unknowingly READY!



COVID-19 could also disrupt agents who face many logistical challenges where clients may seek to avoid risk of exposure.

There will be a significant change in prospecting and marketing their products with which they already had difficulty.

Standard insurance physicals will be replaced, for now, by increased data collection.

If there is one group that has an abundance of complete medical records, spanning a significant time arc, it is the asset-laden Baby Boomers the prime target of trust planning.

Trusts do not get canceled or 1035 exchanged nor does the client shop life insurance and annuity rates, as the tax benefits and legacy structures mute the importance of the carrier, as well as the rate of return.

Once this crisis passes, companies need to be ready with a differentiated hypothesis to effectively produce premium. Those that adapted faster will have capital-flow tilt increasingly in their favor.

Adaptation is a **Virtual Dedicated Marketing Force** that delivers vastly increased case premium through trust planning

Companies need the same clear-eyed perspective to imagine this new world **NOW** and adjust their strategies.

Take a moment and think: *What is the strategy that my company has in the hopper that will shape our path and provide an edge for the next decade,?*

We have the exact strategy.

Dr. Maguire