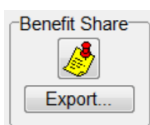




Exporting Data from Trust-Owned Loan-Based Private Split-Dollar System into Wealthy and Wise®

Trust-Owned Loan-Based Private Split-Dollar

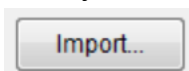
Assume you want to import data from a Loan-Based Private Split-Dollar illustration into Wealthy and Wise to display its effect on a client's overall estate. When you finish entering your data in your Loan-Based Private Split-Dollar and are satisfied with the results, look for this icon on the lower right of your input screens while in Edit mode:



Clicking on **Export** will take the trust's portion of costs and values directly to the InsMark Source Data storage files accessible by Wealthy and Wise. Enter a source data notation--enter a phrase that will allow you to remember this version of source data.

In Wealthy and Wise, **Import** that stored premium financing data using these tabs:

After you click "Schedule," look for this icon on the right side of the following screen:



When you click **Import**, you will go to Source Data Storage, where you should select your recently exported Loan-Based Private Split-Dollar data. It will automatically populate the array. Click OK, and you're done importing.

Note: To access both Loan-Based Split Dollar and Wealthy and Wise digital files used in Blog #221 to see how I entered data, click this file name:

[Blog 221.zip](#)

You must be licensed for both Systems to import each file into its respective System.

InsMark's Referral Resources

(Put Our Illustration Experts to Work for Your Practice)

We created Referral Resources to deliver a “do-it-for-me” illustration service in a way that makes sense for your practice. You can utilize your choice of insurance company, and there is no commission split. They are very familiar with running InsMark software.

Mention Bob Ritter (InsMark President) when you talk to our Referral Resource as they have promised to take special care of subscribers of our Blog. Our only request is this: if a Referral Resource helps you get the sale, place that case through them; otherwise, you will be taking unfair advantage of their generous offer to InsMark licensees.

Save time and get results with any InsMark illustration.

Contact: Ben Nevejans, President of [LifePro Financial Services](#) in San Diego, CA.

Important Note: The information in this file is for educational purposes only. In all cases, the approval of a client's legal and tax advisers must be secured regarding the implementation or modification of any planning technique as well as the applicability and consequences of new cases, rulings, or legislation upon existing or impending plans.

"InsMark", the InsMark logo, and "Wealthy and Wise" are registered trademarks of InsMark, Inc.

.Copyright © 2020-2022 InsMark, Inc.

All Rights Reserved