



Blog #191

Details of the Alternative Equity Investment

Growth Assumption¹: 6.90%

Dividend Assumption: 2.00%

Income Tax Bracket 45%

Capital Gains Tax: 25%

Portion of Capital Gains that are Long-Term: 50%

Portfolio Turnover Rate: 35%

Management Fee: 1.00%

¹ Matching the interest assumption of the IUL.

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