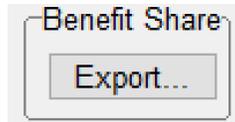




Exporting Insured's Data from Loan-Based Split Dollar to the Dual Security Buy-Sell Plan

Assume you want to export data from a loan-based split-dollar illustration to a Dual Security Buy-Sell Plan in the InsMark Illustration System to display its overall effect on a buy-sell plan and retirement cash flow. When you finish entering your data in your Loan-Based Split-Dollar System 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 executive's split-dollar portion of costs and values directly to the InsMark Source Data storage files. You will be asked for a source data notation – enter a phrase that will allow you to remember this version of source data. When saved, it is accessible by the InsMark Illustration System (or any other InsMark System).

Next, open a new Client Workbook in the InsMark Illustration System by using Client Workbook / New. Give your new Workbook a suitable name, and you will automatically proceed to the screen below. (You can always get to this screen in an open Workbook by selecting “New” from the Workbook Main Window.)

New Proposal for the Blog #202 DSBS Plan (Split Dollar) Workbook

Proposal description
Storage description for proposal*: Proposal 1
*Storage descriptions are reminders to yourself to identify stored proposals.

Source data
Select source data: Oliver Belmont
Storage description for source data*: Benefit Share
*Storage descriptions are reminders to yourself to help identify stored source data.

OK
Cancel
Help

Personal Insurance | Executive Benefits | Split Dollar | InsCalc (Financial Calculators) | Personal Needs Analysis (Survivor and Retirement)

Business-Owned Life Insurance with Roll-Out

- Dual Security Plan (for LLCs, LLPs, and Partnerships)
- A Composite of Dual Security Plans
- Dual Security Plan Buy-Sell for C or S Corporations (Limited Liability Company is the policyowner)
- A Composite of Dual Security Buy-Sell Plans

Executive Trifecta (for any entity) (Key Executive Coverage, Survivor Income Benefits, and Subsequent Transfer of Policy to Executive)

- A Composite of Executive Trifecta Plans

Executive Trifecta PowerPoint show

- Key Executive Life Insurance Calculator (including Survivor Income Benefit Calculator)

Corporate-Owned Life Insurance

- Salary Continuation / Deferred Compensation (COLI)
- Survivor Income (Death Benefit Only)
- A Composite of COLI Plans

Executive-Owned Life Insurance

- Executive Bonus Plan
- Executive Security Plan (bonus plan with retirement income)
- A Composite of Executive Bonus Plans

Miscellaneous

- Illustration of Values
- Funding Buyouts with Discounted Dollars

Select Dual Security Buy-Sell Plan. Click on “Create New” which takes you to Source Data Storage where you should select the Storage Description (source data notation) you previously designated when you exported your split-dollar data. Download its data to your Dual Security Buy-Sell Plan by selecting OK.

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