

## IS THERE AN IDEAL ASSET?

### What is it that you're looking for when it comes to storing/growing your money?

If we assume that there is an "ideal financial solution" out there then what are the distinctives that set it apart? Below are the "8 Ideals" we personally compare when trying to determine how effective a financial tool is. In the chart below you can see how several popular financial systems stack up when compared using these ideals.

<b>8 IDEALS</b>	<b>WHOLE LIFE INSURANCE</b>	<b>CD &amp; MONEY MARKET</b>	<b>REAL ESTATE</b>	<b>MUTUAL FUNDS</b>	<b>401K, 403B, 457, IRA</b>	<b>STOCKS</b>	<b>ROTH IRA</b>	<b>529</b>
Guarantees	<b>YES</b>	<b>YES</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>
Constant Compounding	<b>YES</b>	<b>YES</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>
Liquidity	<b>YES</b>	<i>Not until After Maturity</i>	<b>YES</b>	<b>YES</b>	<b>NO</b>	<b>YES</b>	<i>After 59.5</i>	<b>NO</b>
Flexibility	<b>YES</b>	<b>NO</b>	<i>Some</i>	<i>Some</i>	<b>NO</b>	<b>YES</b>	<b>NO</b>	<b>NO</b>
Privacy	<b>YES</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>
Tax-Advantaged	<b>YES</b>	<i>Until With-drawn</i>	<i>Until Sold</i>	<i>Until Sold</i>	<b>YES</b>	<i>Until Sold</i>	<b>YES</b>	<b>YES</b>
Rate of Return	<b>YES</b>	<b>YES</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>
Passive Income Generating	<b>YES</b>	<b>NO</b>	<b>YES</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>	<b>NO</b>

## READY TO LEARN MORE?

These ideals can be applied to any saving or investment opportunity. If you'd like to learn more about how we're using whole life insurance to accomplish these ideals [click here](#).