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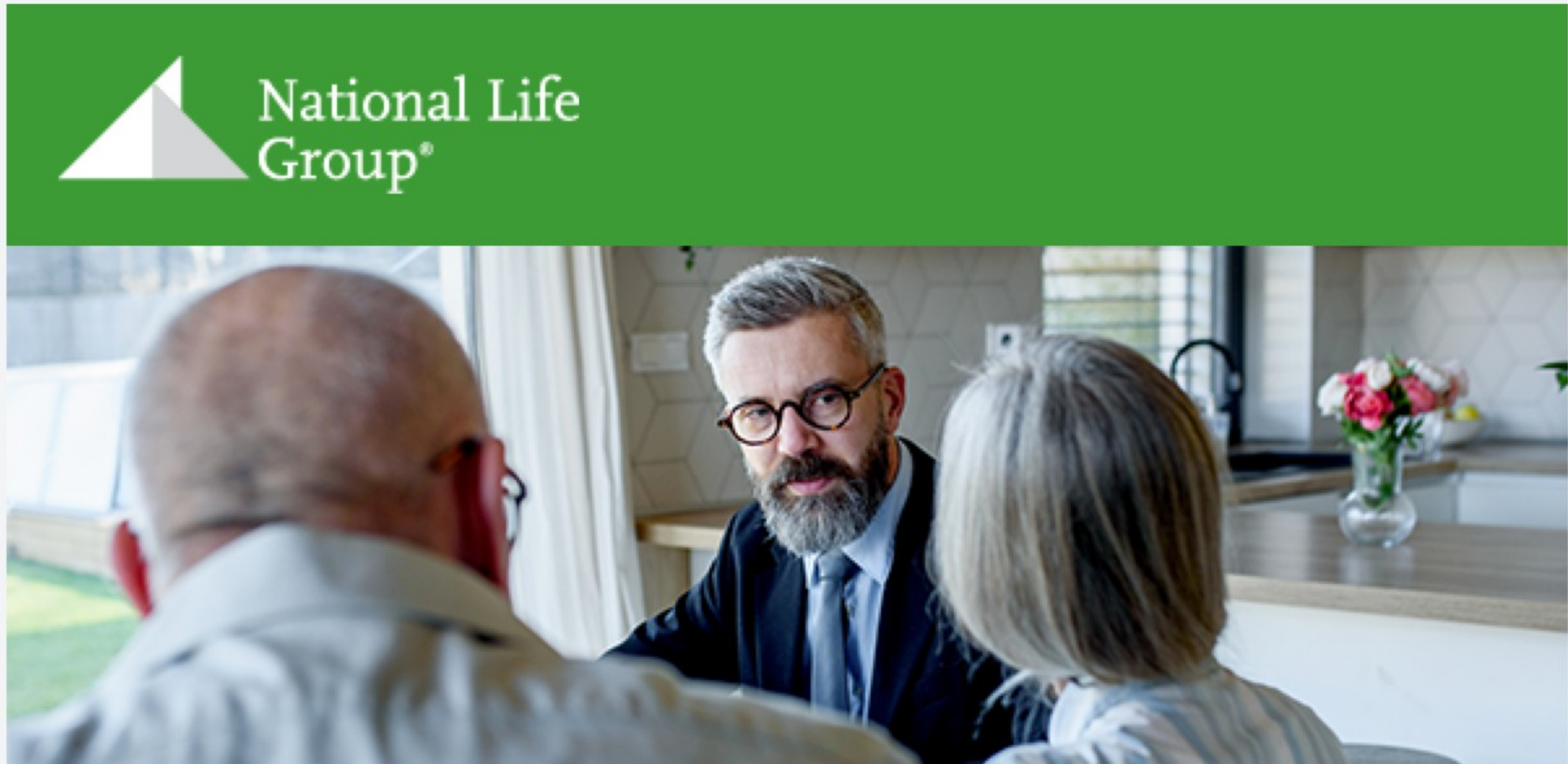
Please include your name, physical business address, and email signature (or, if associated with Equity Services, Inc. (ESI), your approved email signature including your ESI disclosures) as part of this email before it is sent. Please note that all disclosures, form/TC #s, and opt-out instructions that appear in this email must be included and not changed. Do not include a website as part of your email signature unless the website has been reviewed and approved by the AGT.

**Create email instructions:**

- Choose a template and click on Download Email. The template will open in a new browser window or tab.
- Click anywhere on the page and select all (Ctrl +A) and copy (Ctrl + C).
- Create a new email. Click in the body of the email and paste (CTRL + V) the template into your email.
- Add the subject line included in the instructions at the top of the template.
- Personalize the email with your contact information as noted.
- Remove the instructions.
- Send a test copy to yourself or a colleague

Please be sure to read the resources under Email Marketing found on the agent portal under Training / Compliance / Advertising/Social Media / Telemarketing and Email Solicitation. This provides important information regarding CAN-SPAM requirements and your responsibility to scrub email lists prior to sending any marketing emails.

**Agents/RRs/IARs** – Please use the following email subject line: A Flexible Approach to Transferring Your Wealth



## Gain Flexibility and Still Keep Control with a Survivorship Standby Trust

When planning your estate, control and flexibility matter. A Survivorship Standby Trust (SST) offers an alternative to traditional Irrevocable Life Insurance Trusts (ILIT) or personal ownership structures, allowing you to maintain control of your life insurance now while creating a clear path to transition it into a trust later.

When used as part of a thoughtful estate plan, these trusts can help:

- Maintain control and access during your lifetime
- Align wealth transfer with long-term planning objectives
- Provide structure around how benefits are ultimately used
- Potentially reduce estate tax exposure

Watch the video to learn more about SSTs and how they can benefit you.

### Lessons for Life (and Death): Survivorship Standby Trusts



Click on image above or go to: <https://nationallife.wistia.com/medias/oz3e2l9guk>

Contact me to explore your SST options today.

[Agent Name]  
[Agency Name]  
[Business Address]  
[Agent Phone #]  
[Agent Email Address]  
[(If in CA or AR) State Insurance Lic. #:]

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