



The **CLTC-WealthSecure** System

*A Powerful New Software and Marketing
System for Presenting Long Term Care
Insurance to the Affluent
and their Businesses*

For Financial and Investment Advisors



WEALTHSECURE
A Corporate Compensation Plans Company



The **CLTC-WealthSecure** System

Philip Davis and Harley Gordon have combined over 60 years experience in designing the **CLTC-WealthSecure** System to help you sell long term care insurance to the affluent and their employers.

Philip Davis is President and Founder of Corporate Compensation Plans (CCP) and WealthSecure. His articles have appeared in Employee Benefit News as well as other industry magazines and have been featured in The New York Times, Business Week, CFO Magazine, and the Institutional Investor. As a Life Member of the Million Dollar Roundtable and 17-year qualifier for its Top of the Table, Phil continues to guide CCP and WealthSecure with his creative expertise.



Harley Gordon, Esq. is a Founding Member of the National Academy of Elder Law Attorneys. His views on the emotional, physical and financial consequences of long term health care have been featured on the CBS Evening News, The Today Show, CNN and the Wall Street Journal. He is also the creator of the "Certified in Long-Term Care" (CLTC) program, the country's first designation focused on training financial service professionals on how to create long term care plans for their clients. Mr. Gordon's website is www.ltc-cltc.com.

For more information about the **CLTC-WealthSecure** System

Contact: Tasha Mayberry
Email: tmayberry@wealthsecure.com

The Elephant in the Room

The cost of long term health care - which can easily run over a million dollars - is the elephant in the room of most financial and investment advisors. Wealth managers and financial professionals generally do not understand the severe consequences not having a plan for long term care will have on the emotional, physical and financial well-being of their clients' families. Subsequently, this subject is rarely discussed, which results in their clients remaining exposed to unforeseen costs that can destroy their financial and investment management goals. Even if the professional wants to discuss the issue, many affluent clients counter with the following concerns:

- "What if I don't use the insurance?"
- "I have enough assets to self-insure."
- "Paying the premium would be a lost investment opportunity."
- "I have enough resources to pay for care."

The *CLTC-WealthSecure* System uses a consultative approach to overcome these issues.



It gives you the language that you need to confidently address the serious consequences needing care over a period of years will have on the client's family. It then displays two solutions for managing these consequences:

Solution 1: Self-insuring the cost – The System presents a proprietary, comprehensive tax, investment, income and asset analysis which shows in black and white the true cost of that decision.

Solution 2: Transferring the cost – The client is then presented with a compelling case for shifting those costs to an insurance carrier.

The client is then left to decide the appropriate course of action.

For the first time you have the tools to position LTCI as a financial transaction that preserves, not only the emotional and physical well-being of your client's family, but his (or her) sophisticated tax, estate, retirement and succession plans.

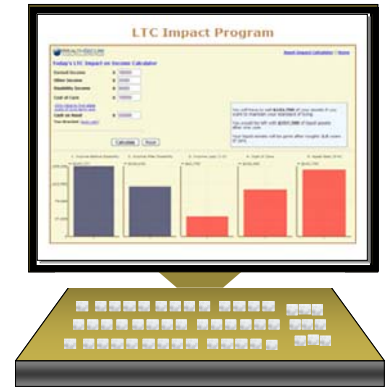
The *CLTC-WealthSecure System* positions you as an authority on the subject of long term care financing and will help you:

- Attract **new** clients
- **Cross-sell** existing clients
- **Diversify** your business

Here's how it works

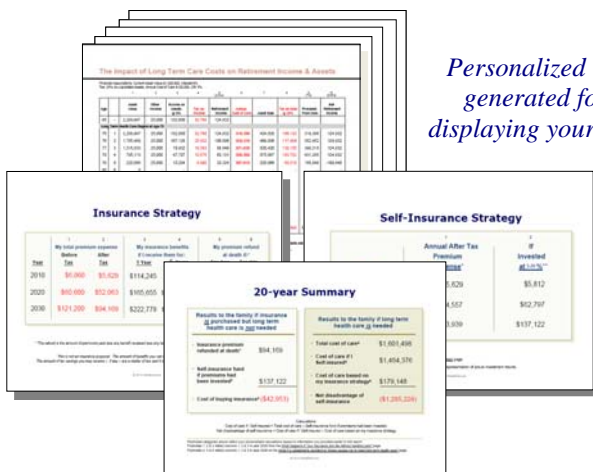
The System is comprised of two components:

- **The LTC Impact Program** takes a client's financial picture and integrates it into the cost of care at present and in the future. You are immediately given an analysis as to how severe the financial and tax consequences would be if the client chose to self-fund the event.
- **The LTC Funding Program** then gives your client an in-depth report of what happens if the risk of care is transferred to an insurance carrier. The analysis is then super-imposed into business settings to show the client added tax advantages.

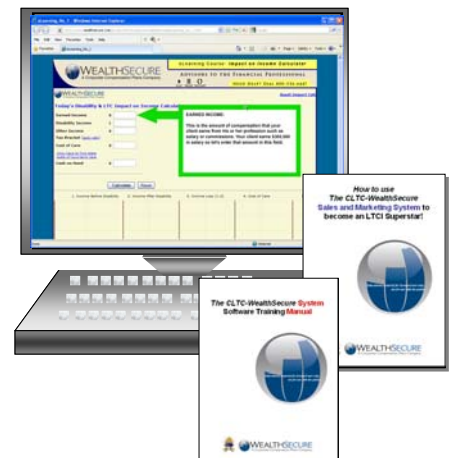


Additionally, you have access to:

- **E-Learning & Software Training Manual:** Dynamic e-learning courses to quickly teach you how to use the program and a comprehensive software training manual for easy reference.
- **Sales and Marketing Concepts:** Phil Davis and Harley Gordon make you the beneficiary of over 60 years of marketing and selling insurance products to the wealthy.
- **Licensee Website:** The licensee-only website contains a multitude of legal/tax and sales/marketing resources in addition to current LTC studies and articles.



Personalized reports can be generated for your client displaying your name and firm.





The **CLTC-WealthSecure** System

Your System includes:

- LTC Impact Program software.
- LTC Funding Program software.
- Access to website rich with legal/tax and sales/marketing resources.
- Sales concepts by Phil Davis, a 17-year qualifier of the Million Dollar Round Table's "Top of the Table," and Harley Gordon, the creator of the Certified in Long-Term Care Program.
- State-of-the-art software training manual.
- Access to LTC Impact e-learning courses.
- Access to LTC Funding e-learning courses.
- Ongoing technical support.

*The programs run on Windows 2000, XP, Vista, Windows 7 and MacIntosh Parallels/Windows 7.
The WealthSecure System also requires Adobe Acrobat Version 4 or higher.*

For a video demonstration or
to learn more about the **CLTC-WealthSecure** System go to:
www.wealthsecure.com

Or contact Tasha Mayberry at:

Email: tmayberry@wealthsecure.com

Phone: 800.334.6447