List of FINRA-Reviewed VSA Content

Client Presentations

Personal Needs:
- A Lesson in Life Insurance (with variable products)
- A Lesson in Life Insurance (without variable products)

Retirement Needs:
- Retirement Planning Analysis
- The Role of Life Insurance in Retirement Planning
- Retirement Income Protection
- A Deferred Annuity Review (with variable products)
- An Immediate Income Annuity Review (with variable products)
- Traditional IRA/Roth IRA
- TDA
- A Lesson in Annuities (with variable products)
- A Lesson in Variable Annuities
- A Lesson in Fixed Interest and Indexed Annuities
- A Deferred Fixed Interest and Indexed Annuity Review
- A Lesson in Indexed Annuities
- "Stretch" IRA
- Reverse Mortgages

Estate and Charitable Planning:
- A Lesson in Charitable Giving
- A Charitable Trust Review
- Charitable Gifts of Life Insurance

Business Continuation Planning:
- Insured Stock Redemption Buy-Sell Plan for Corporations
- Insured Section 303 Stock Redemption Plan

Executive Benefit Planning:
- Business Split Dollar Life Insurance Plan

Employee Benefit Planning:
- A Lesson in Qualified Retirement Plans
- An Owner Only 401(k) Plan

Needs Analysis Calculators

Personal Needs:
- Human Life Value Report
- Survivor Cash Needs Report
- Survivor Income Needs Report
- Survivor Cash and Income Needs Report
- Retirement Analysis Report
- Cost of Raising a Child
- Do You Still Have Enough Life Insurance?
- Do You Still Have Enough Disability Income Insurance?

Estate Planning:
- Federal Estate Tax Report

Business Needs:
- Business Valuation Report
- Key Employee Valuation Report
- Pre-Tax Profit Equivalent Report
- After-Tax Corporate Cost Report
- Cost of Group Term Life Insurance Report
- Estimated Corporate Alternative Minimum Tax Report
- Self-Employed Qualified Retirement Plan Contribution Report

Employee Benefits:
- Compensation and Benefit Statement