

# Protect Your Legacy for Generations

Sophisticated Life Insurance Solutions  
for Ultra-High Net Worth Individuals



# Make a Life Insurance Plan That Lasts

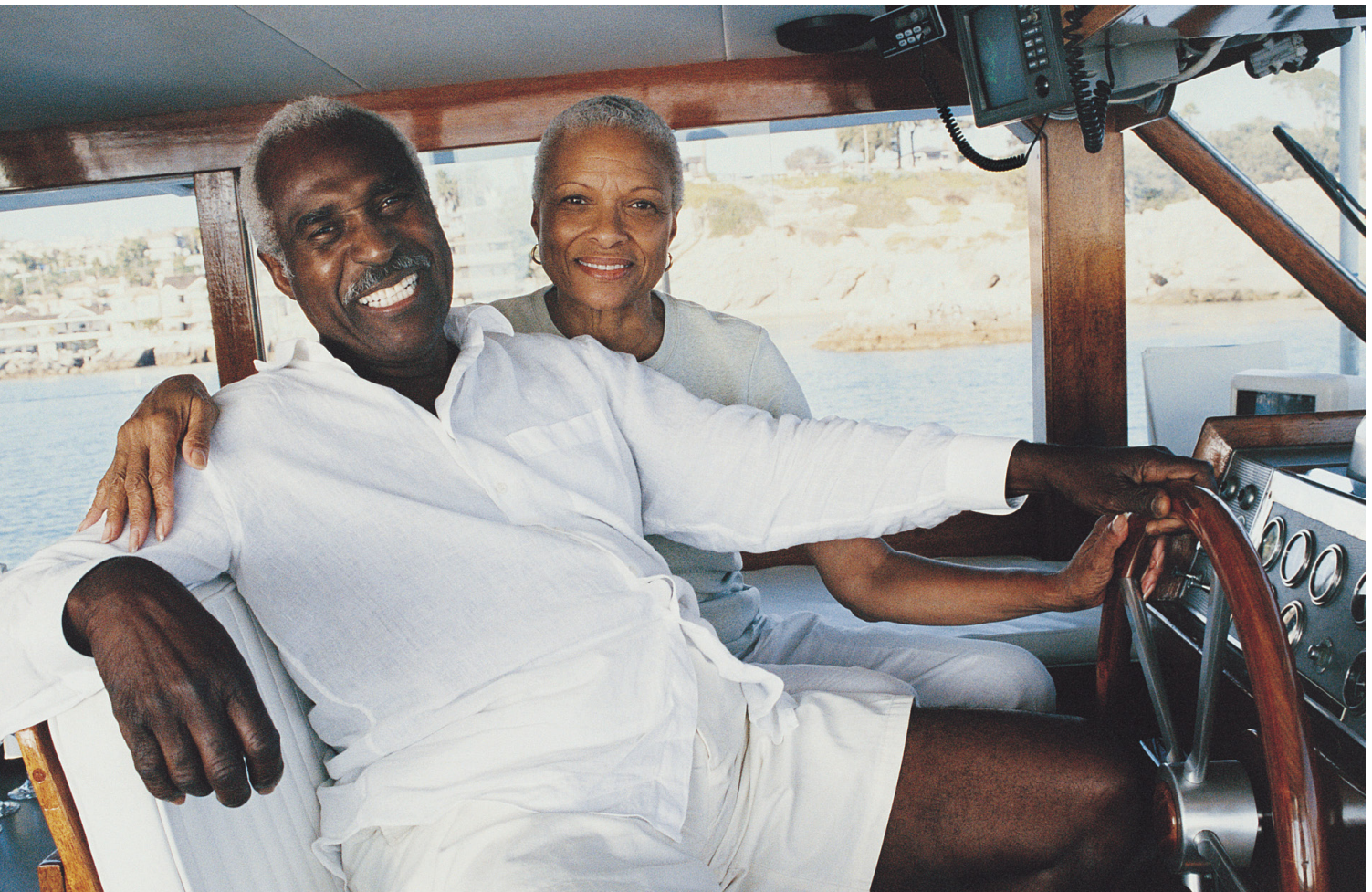
Aon is a leader in life insurance design, implementation and administration for ultra-affluent families with large life insurance portfolios.

Life insurance, like many other investments, requires continuous oversight to maximize its potential for your estate or retirement needs. Constant headwinds from interest rate, tax, regulatory, and market changes push your plan off-track. You need a partner who has the expertise and resources to deal with the ever changing landscape, make sure your plans stay the course for the next 30 or 70 years, and who will be there to provide guidance for future generations.

As one of the largest global insurance brokers, Aon is uniquely positioned to be your family's life insurance portfolio management team for generations.

Our services include:

- Sophisticated design strategies to help minimize gift taxes, reduce out-of-pocket costs and maximize transfer of assets
- Comprehensive product research and analysis
- Customized reports and in-force projections tailored to your unique needs
- Proprietary administration systems linked directly to top carriers
- Family office support
- Trust support (GRATs, SLATs, ILITs)
- Premium financing resources



# Why Aon

Our experience helps us provide tailored risk and portfolio management while addressing volatility and regulatory changes.

## Better Informed

- Multi-generational life insurance portfolios require a high level of attention to detail and a dedicated team of experienced professionals. Aon's team has over 100 professionals with life insurance expertise including actuaries, lawyers, accountants, and financial professionals
- With individual life insurance policies implemented exceeding \$300,000,000 per Insured, over 200,000 policies and \$12 billion of cash value assets under management, we see trends before they can impact your portfolio
- Breadth of experience; globally, across sectors and over time

## Better Advised

- Comprehensive strategies for managing and optimizing your portfolio
- Practical support for implementing your portfolio strategy
- Collaborative, sleeves-rolled-up approach

## Better Decisions

- Aon's team of experts helps you anticipate and address challenges of market volatility
- Our advisors navigate regulatory & tax complexities so you can focus on what matters most to you
- We offer unparalleled underwriting relationships with premier carriers, ensuring that you receive maximum protection for your specific exposures





## About Aon

**Aon plc** (NYSE: AON) exists to shape decisions for the better — to protect and enrich the lives of people around the world. Our colleagues provide our clients in over 120 countries and sovereignties with advice and solutions that give them the clarity and confidence to make better decisions to protect and grow their business.

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