

# Van Dusen Capital Enterprise Insurance Strategy Guide

## Carrier Product Breakdown — F&G; IUL

Fidelity & Guaranty Indexed Universal Life products are designed to provide permanent life insurance protection with accumulation potential linked to index performance while protecting against market loss. Features may include index crediting strategies, participation rates, caps, floors, and optional riders for living benefits. Strategic insurance planning focuses on protection, liquidity, tax efficiency, and long-term stability. Properly structured policies can support retirement income, wealth preservation, estate planning, and business continuity.



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# Real Case Studies

Businesses and individuals often use insurance to provide liquidity, reduce risk exposure, and create growth opportunities. Case studies demonstrate how policy design, funding strategies, and risk planning align with long-term financial objectives. Strategic insurance planning focuses on protection, liquidity, tax efficiency, and long-term stability. Properly structured policies can support retirement income, wealth preservation, estate planning, and business continuity. ■■■■

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# Interactive Workbook Planning

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# Advanced Planning Worksheets

Planning Area	Goal	Current Status	Action Needed
Life Insurance			
Retirement Income			
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