

LIFE SETTLEMENT CASE STUDY

WELCOME FUNDS, INC.



WOULD YOU RATHER?

\$187,000

OR

\$0

WELCOME FUNDS REPRESENTS YOUR BEST INTERESTS!

A small business was filing for bankruptcy and its assets were being reviewed. The company's financial advisor helped the partners identify the value, which they did not know existed, contained in its key man life insurance coverage. The advisor recommended that Welcome Funds appraise the policy. The business decided to maintain the coverage so that the policy could be sold as a life settlement, instead of letting it lapse for \$0. The proceeds from the sale paid off creditors and finalized the bankruptcy settlement. The partners were able to address their much needed liquidity needs and move on with their lives.

Policy's Insured	Male Age 77
Health Status	Fair
Policy Type	Universal Life
Face Amount	\$1,500,000
Annual Premium	\$74,000
Surrender Value	\$0
Life Settlement Payout...	\$187,000

ABOUT WELCOME FUNDS

For the past 23 years, Welcome Funds has served the best interests of policy owners by maximizing life settlement offers through auction-based negotiations with the top buyers in the market.

33,000+

Offers
Negotiated

\$1+ Billion

Paid to
Consumers

12+

Average # of
Bids Per Policy

Services may not be available in all states. The above case study is taken from the internal files of Welcome Funds. Case studies are provided for informational and educational purposes only. Results may vary. Qualification is based on age, health, and future premium costs, and not all policies will qualify for an offer. The client's name has been changed to protect his privacy. The following summary represents the transactional averages of Welcome Funds Inc. for policies closed between 7/1/2022 to 12/31/2022: \$1,903,976 face value, \$324,062 net amount paid to seller; 24.36% of net death benefit paid to seller; 11.7 bids negotiated per closed policy; and insured age of 76.97. Closings were completed with 13 licensed Life Settlement Providers. \$1 Billion paid to our clients and 33,000 offers negotiated are based on actual settlements negotiated by Welcome Funds Inc. since its inception.



**CONTACT US TODAY FOR A
FREE PRICE-FIRST® REPORT**



WELCOME FUNDS

Life Settlements, Simplified. Offers Maximized.

CALL 1.877.227.4484

www.welcomefunds.com/pricefirst