

What We Do

Create Sustainable Wealth

Secure Your Financial Future

Manage “Your Personal Bank”

Establish A Family Legacy



Who We Are

The **Client Primacy Principle** is our attitude at Secure Estate Management. Our first, second, last and every priority is designed to improve our clients situation.

We use a **Comprehensive Holistic Approach** in cooperation with our strategic partners. We review your financial, health, legal and tax risks and how they interact and affect your situation to provide solutions.

Secure Estate Management has secured nearly 5000 clients' futures since 1996.



11th consecutive year



Your Personal Bank

Contact Us

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What is Your Personal Bank?

Your Personal Bank is a powerful Financial Concept which allows you and your family to accomplish:

- * Pay off Debt in 1/3 the time without using additional dollars
- * Create Tax-Free Income
- * Tap into the Power of Compound Interest
- * Eliminate Stock Market Risk
- * Create a Tax-Free Family Legacy



In 2007, presidential candidate John McCain secured his initial campaign financing by using this financial tool as collateral.

How Does it Work?

- ◆ Banks don't invest in the stock market.
- ◆ They earn compound interest on deposits.
- ◆ Then borrow against the cash they hold to earn more interest

Former Federal Reserve Chairman, Ben Bernake, has the majority of his personal net worth. between \$1 & \$2 million, invested in this financial concept.



What if you fund an account that:

- ◆ Is Guaranteed and Insured
- ◆ You could borrow the funds
- ◆ Earned interest on the borrowed funds
- ◆ Is Tax-Free to you and your heirs



Why have I not heard of this?

This financial concept is known as Infinite Banking, Be Your Own Bank, Your Family Bank, Your Personal Bank, 770 or 702 Plans, etc.

The financial industry has focused almost exclusively on the ultra wealthy for this financial concept.

As a result, only a tiny percentage of advisors have ever been introduced to this concept.

Proper Implementation

This concept is gaining recognition but this is a new idea for most advisors. For the best results you need:

- ◆ Mutual financial institution: no Stockholders
- ◆ 50%+ liquidity: available day one
- ◆ Experienced Banking Advisor to properly design and implement

Getting Started

Contact your Secure Estate Management Representative to establish Your Personal Bank and start living life more abundantly!