

Your Personal Bank

Famous Examples

JCPenney

J. C. Penney used the cash in his life insurance policies to help meet company payroll after the 1929 stock market crash. Banks were not lending, and many were closing. Had he not had access to his cash, the company probably would have closed its doors.



Franklin Roosevelt's net worth when he died was about \$15 million, nearly entirely cash in his life insurance policies.



Bob Hope used the cash in his life insurance policies to become one-third owner of a series of movies he filmed with Fred Astaire in the 1940's. The films were the foundation to help him become a multi-millionaire.



Ray Kroc had constant money problems during McDonald's early years. He accessed cash via policy loans to help cover salaries of key employees and to create the initial Ronald McDonald advertising campaign.



Walt Disney accessed \$1 million of cash in his life insurance policy in 1953 to build Disneyland after being turned down by over 300 banks. Disneyland likely would not have been built otherwise.



Sam Walton funded high cash value life insurance policies for decades to grow wealth and pass it on to future generations on a tax-free basis.



John McCain pledged \$3 million of cash in his policy as collateral to secure initial campaign financing for his presidential campaign in 2008. It was very difficult to obtain bank loans during the Great Recession. The banks required collateral to secure his loan.

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