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The newest tools and materials to support
your estate planning strategies



Expanding Our Support for Trust Owned Life Insurance

Over the years, Lincoln has remained committed to helping our distribution partners grow their business by providing a strategic focus that extends well beyond being just a product provider. Between our specialty markets and advanced planning teams and our leading-edge underwriting, we at Lincoln are committed to giving you the tools you need to drive sales.

With estate planning becoming a focus for so many in 2022, we wanted to provide our distribution partners leadership material and tools to help drive the customer experience when they are building Trust Owned Life Insurance (TOLI) cases. Trusts can provide owners with more control over how their assets are distributed upon their death and using trusts can also help reduce the potential income, gift, and estate taxes associated with those assets. This is why TOLI education is so critical and is the purpose behind our new TOLI Digital experience which will include videos, conversation starters, an estate tax liability calculator, and support for both pre and post-sale.

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