

LIFE INSURANCE AND CHARITABLE GIVING OPTIONS FOR YOUR MEMBERS

OFFERED BY: NATIONAL AFFINITY SERVICES-NAS
MARK BLOCKER, PARTNER
MARK@NATIONALAFFINITY.NET
DIRECT: (312)547-9553

WHAT LIFE INSURANCE CAN DO FOR YOUR ORGANIZATION

1. Establish a new Options for Giving platform for members and friends of the organization to give significant contributions today.
2. Grow your foundation toward a sustainable future with Predictable Contributions. Your organization owns the policies which gives you access to the cash values and allows you to post the policy as an asset on your balance sheet, which you can collateralize.
3. Your organization owns the policy allowing members to make tax-deductible donations to your organization to fund the policy

WHAT LIFE INSURANCE CAN DO FOR YOUR MEMBERS

1. Ability to make a "Legacy Gift" now.
2. Gain recognition for their contribution today. Recognition creates more giving by peers.
3. Tax Benefits! Deductible contribution plus reduced estate taxes.
4. Asset protection for donor and heirs
5. Give \$100,000, \$250,000, \$500,000, \$1 million or more at a relatively low cost – allowing them to give a much larger gift.
6. Pride in making a significant impact now & in the future.

LEARN MORE

1. A planned gift is a way to make a significant future gift with assets that are currently in use or by using assets today to enhance their charitable giving potential.
2. Planned gifts are sometimes referred to as deferred gifts because the gift is often not realized until much later.
3. These gifts provide a way for members to make larger future gifts than they might be able to make today.
4. Many planned gifts can provide income opportunities for the donor then transfer the assets to your organization upon death..

LEARN MORE (CONTINUED)

5. Others leverage current assets to enhance the potential of the gift at death.
6. Whether a donor uses cash, life insurance, appreciated securities/stock, real estate, artwork, the benefits of funding giving through Whole Life Insurance is very attractive to all parties.
7. Cash values of policy are booked as an asset.
8. Foundation/Association owns the policy.

\$50,000. GIFT TO MEMBERS

1. Offer your members FREE life insurance with LIFEBRIDGE
2. Protect their dream of providing an education for their children if they die before they complete their schooling.
3. Gain recognition and appreciation from your members.
4. Educate members on the features & benefits of life insurance
5. How it works
 - \$50,000 Death Benefit to cover educational expenses
 - Parents, under age 43, with dep. children under age 19
 - Annual income between \$10,000-\$40,000
 - Must be in good health and not a felon

Sponsored by Mass Mutual

MassMutual's Lifebridge® Free Life Insurance Program⁴ makes life insurance free to eligible parents and guardians because MassMutual pays the premium. Mass Mutual plans to give away \$1 Billion of free life insurance.

BENEFITS

1. LifeBridge free life insurance program
 - Protect children's education
 - Experience the power of life insurance
2. Living Legacy giving plan
 - Use life insurance to make an impact
 - Gain recognition
 - Tax saving
3. Ferrin Society planned giving
 - What success looks like for an organization like yours
 - Model your organization's program after the Ferrin Society

ABOUT MASS MUTUAL

- 160-year tradition of strength, stability and performance
- *2012 Fortune World's Most Admired Companies.*
- 2011 Working Mother 100 Best Companies: most family-friendly companies
- MassMutual's financial strength ratings are among the highest of any company in any industry.
 - A.M. Best Company.....A++ (Superior)
 - Fitch Ratings.....AA+ (Very Strong)
 - Moody's Investors Service.....Aa2 (Excellent)
 - Standard & Poor's.....AA+ (Very Strong)

THE COMPANY WE KEEP

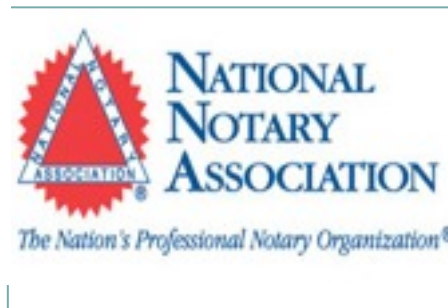
Utah State Bar®



A service offered by your credit union
Provided by Alloya Corporate FCU



Air Line Pilots Association, Int'l



Alumni Association
THE UNIVERSITY OF UTAH



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THANK YOU

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NATIONAL AFFINITY SERVICES-NAS
PO BOX 680842
PARK CITY, UT 84098

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