PREMIER
GLOBAL ADVISORS

A Member of the Professional Insurance Brokers Association

Exclusive Advisory Series · Wealth Structuring · Private Placement Life Insurance

Private Placement Life Insurance

SOPHISTICATED WEALTH MANAGEMENT FOR HIGH-NET-WORTH INVESTORS

Core Benefits

01 Tax-Deferred Growth



No annual tax drag on dividends, interest, or gains, full compounding, uninterrupted.

02 Investment Flexibility



Hedge funds, private equity, real assets - institutional access most wrappers can't offer.

03 No Rebalancing Tax



Rebalance the portfolio at will, without triggering a taxable event.

> ***"PPLI represents one of the most compelling intersections of investment flexibility, tax efficiency, and estate planning available to sophisticated investors today."***
>
> **PRIVATE WEALTH ADVISORY PERSPECTIVE**

Strategic Advantages

Estate Planning & Wealth Transfer

Income-tax-free death benefits, no probate. A cornerstone of multi-generational planning.

Privacy & Discretion

Ownership and underlying holdings stay off the public record.

Creditor Protection

In many jurisdictions, a meaningful shield from creditors and legal claims.

HNW Families

Individuals with significant liquid assets seeking long-term, tax-aware growth and structural protection.

Succession Planning

Families focused on multi-generational wealth preservation and tax-efficient asset transfer to heirs.

Sophisticated Investors

Those who prioritise tax efficiency, institutional-grade portfolio control, and confidential structuring.

Important Considerations: PPLI is a specialised instrument. Suitability and regulatory requirements vary by jurisdiction. Consult qualified legal, tax, and insurance advisers before proceeding. Informational purposes only; not financial, legal, or tax advice.

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