

Case Study: Sample “770” Plan

More Americans are moving money from 401(k)s, IRAs, mutual funds, stocks, bonds, and banks in favor of little-known “770 Accounts”. Reason? There are many. One is “770”'s compound wealth AND protect you against ANY losses ...and also can put an **EXTRA Million Dollars** in your pocket—*automatically*.

P R A I S E F O R T H E “ 7 7 0 ”

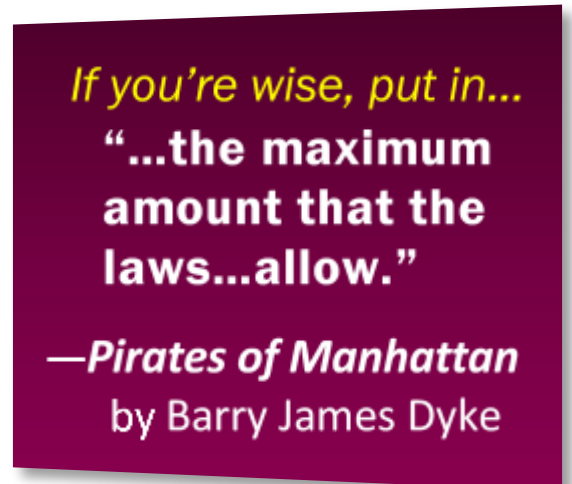
**“Instead of doing what banks say
— put your money in our CDs at
low rates — do what banks DO.”**

— FORBES

**“You will actually be able to sleep
at night instead of worrying about
your financial future.”**

— MARYELLEN TRIBBY

#1 Bestselling Author, *Reinventing the Entrepreneur*



**“Easily one of the smartest
money moves — EVER!”**

— Richard Allen, CPA

**“Single biggest benefit
in the tax code.”**

— ED SLOTT, CPA

National Tax & IRA Expert
as seen on PBS

**“... works many times better
than conventional savings
and retirement plans.”**

— JOHN F. GOODSON

Chairman of the College
of Estate Planning Attorneys

**“...a ground-breaking method that can
put you on the fast track to reaching
your goals and dreams.”**

— T. HARV EKER

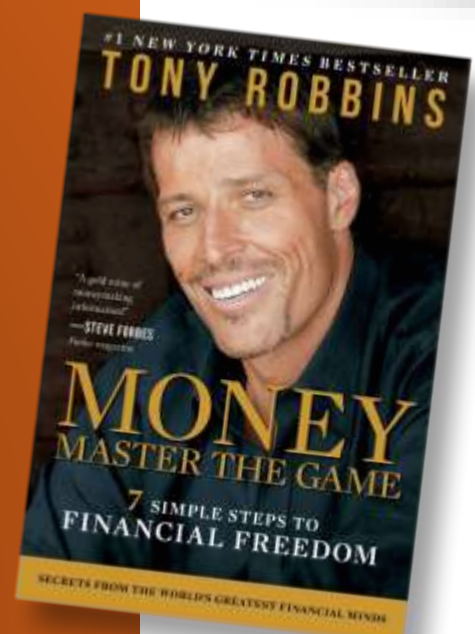
#1 Bestselling Author, *Secrets of the Millionaire Mind*

**“The secret of the affluent”
— THE NEW YORK TIMES**

“I was introduced to this tool by two of the wealthiest individuals I know. For *anyone* who wants to get to his or her financial goals **30 to 50% faster**... you can use this tool to achieve financial security or independence in less than *half* the time.”

— ANTHONY ROBBINS

#1 Bestselling author of *Money: Master the Game*



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The Best Place for Your Seriously-Super-Safe-Cash

FACT :

“770” accounts are **so powerful** you would need to **consistently** earn a virtually unattainable **8% to 10% every year** in a taxable brokerage account ...or tax-deferred IRA or 401(k) ...to equal the **average** net return in a typical and properly designed “770” account.

CASE STUDY: Lindsay, Age 37

The BEST way to illustrate a “770” is to design one together—with your numbers, your goals, your expectations. I hope we do that sometime soon.

In the meantime, below is a plan I designed for my daughter Lindsay. Note, it’s not a **\$250 per month plan** ...though many start there. It’s not a **\$50,000 per year plan** ...though many put in \$10K, \$50k, \$100k, \$200k—or more—EVERY YEAR. And yes, you can start with as little as \$100.

Keep in mind, this is *your* tax-free savings plan—you decide how much you put in, and how often. Plus, you’re **not limited on HOW MANY** plans you own—there is NO LIMIT ...and **no limit on HOW MUCH** you put in them. It’s **your money, your plan** ...or multiple plans.

That said... at 37, Lindsay knows time is running out—she needs to get serious about saving. She decides to save **\$650 per month** or **\$7,800 annually**. To keep things simple, she’ll make **one** annual payment each year. Of course, *monthly automatic bank transfers* are also available. Again, it’s **custom-tailored all the way**—you decide what works for you.

As an example, part of Lindsay’s strategy is to use her **annual Tax-Refund** each year, as well as set aside a small sum each month, and together they add up to \$7,800. Simple.

Be creative. Many are moving money from 401(k)s, IRAs, mutual funds, stocks, bonds, and banks into their “770 Accounts” (the IRS lets you do it *without penalties* under **Section 72t**).

Others contribute to their 401(k) up to the **employer match** and everything else goes into their “770” ...to be used for not only for retirement, but also to **get out of debt**, save for **college**, stop paying interest to credit cards and financing companies, create an **emergency fund**, a **new car** fund, **remodel** the kitchen fund, **vacation** fund ...the possibilities are endless as your imagination.

Still others use their “770” as their **primary retirement account**. They do this for MANY reasons. Unlike a 401(k), 403b, or IRA **your money isn’t locked up**—you have *access to it anytime* for any reason **without any penalties or taxes** when you pull out funds (if done in the way I’ll show you).

Nothing you pull out is ever reportable to the IRS ...every dime is 100% tax-free. **Never again will you pay taxes** on your growing assets or on the money you pull out. This is HUGE ...just ask your CPA. **This favored tax treatment can be especially helpful for small business owners.** It can save you HUNDREDS of THOUSANDS in taxes.

Lastly, for the sake of **example** and **education**, the table below is **not** an actual illustration ...but the numbers come from one. Actual illustrations are loaded with numbers, and **14-columns wide** ...this one is **five** ...and therefore presented for **educational purposes only**.

These five columns cut to the chase and reveal the **growth potential** inside a properly structured “770” account. Again, it be better with your numbers. But this will give you a closer look at what it can do.

Get More from Your Savings





GROW your money at a pre-tax equivalent of **8.00-10%**
With NO WALL STREET Risk!

Lindsay's "770"

WHILE your money pool is growing, YOU have access to it. Need a **vacation**? Hawaii? Italy? Alaskan Cruise? ...Disneyland?

In **year 3** your cash increase is **\$8,317**...greater than your premium. 100% of your Premium Now Goes to Cash Accumulation ...essentially, your insurance is FREE

Total Outlay to Date
\$41,442

You paid in **\$7,800** but your cash **increased \$12,910**

Same as a taxable rate of **9.01%*** rather than 1% the banks pay
*5.86% TAX-FREE

Annual Dividends can be used in a variety of ways...
...it's **your** money.

You would need to earn the taxable equivalent of **8.70%** on your money for **ALL 28 YEARS** to create this money pool (28yrs: **5.65%** tax-free)

Year	Age	Dividend	Money Pool	FREE Protection
1	38	\$163	75% \$5,880	\$302,466
2	39	376	13,295	335,133
3	40	576	21,612	363,938
4	41	938	32,390	399,964
5	42	1,225	42,230	428,906
6	43	1,564	54,352	464,544
7	44	1,947	65,672	493,754
8	45	2,334	79,360	529,243
9	46	2,704	92,270	558,753
10	47	3,146	107,643	594,274
11	48	3,577	122,112	624,317
12	49	4,085	139,132	660,088
13	50	4,585	155,570	690,857
14	51	5,173	174,674	727,121
15	52	5,763	193,321	758,853
16	53	6,443	214,760	795,889
17	54	7,112	235,661	862,816
18	55	7,906	259,920	866,876
19	56	8,337	583,924	1,269,611
20	57	8,337	583,924	1,269,611
21	58	8,337	583,924	1,269,611
22	59	8,337	583,924	1,269,611
23	60	8,337	583,924	1,269,611
24	61	8,337	583,924	1,269,611
25	62	8,337	583,924	1,269,611
26	63	8,337	583,924	1,269,611
27	64	8,337	583,924	1,269,611
28	65	8,337	583,924	1,269,611
29	66	8,337	583,924	1,269,611
30	67	8,337	583,924	1,269,611
31	68	8,337	583,924	1,269,611
32	69	8,337	583,924	1,269,611
33	70	8,337	583,924	1,269,611
34	72	29,228	922,573	1,602,519
35	73	30,003	1,036,052	1,710,566
36	74	33,003	1,036,052	1,710,566
37	74	33,003	1,036,052	1,710,566

Need New furniture? Dining Room, sofa, TV, bed? Car repairs? Another vacation?

Orthodontics for the kids? Remodel the kitchen or basement? **New car?**

Need **down payment** money for a rental property? *And then let your renters pay off the loan for you?*

5.22%

TAX FREE

THAT'S THE SAME AS **8.00% TAXABLE**

Pays **twice as much** as the highest-quality government bonds, and **4-5 times more** than CDs. Yet unlike bonds or CDs—you can access your money anytime without penalties ...or taxes.

1.65% Taxable 1yr CD

Need money to fund **College Tuition** or other big expenses?

Need a **Quarter of a MILLION** for anything?

Oops... you're dead. **\$1.2 million tax-free** for your heirs.

Did you notice how **this benefit got bigger every year** ...yet your \$7,800 contribution never increases to cover it? Perfect!

"Automatic Safe-Money Millionaire"

What will tax-rates be **28yrs from now?**

At today's rates, this account is worth **\$1.2MILLION** in a TAXABLE plan.

Plus... Your money is protected from Wall Street crashes
No ugly surprises—EVER

Get More from Your Savings

Did you notice you only need **HALF** of what your friends will need to retire? Reason: Money you pull out is **ALL TAX-FREE** ...but *theirs* won't be, most likely. No stock market risk either. Plus, their heirs won't get **\$1.2 Million** tax-free if they should die. Yours do. **AND...** ANY MONEY you pull out **WON'T REDUCE** your **SOCIAL SECURITY BENEFITS**, and *it won't bump you into a higher tax bracket*. Why? Nobody in the Government knows you have this account, or how much you pull out –it's that private.

"I have **got** to get me one of THESE!!"

— **WILL SMITH** as Captain Steven Hiller
"INDEPENDENCE DAY"

...a metaphorical suggestion
for *your* Financial Independence Day

Thanks to this custom "770", Lindsay's financial life is practically on **auto-pilot**. She takes money out of her savings account and puts it in her "770". Meanwhile, as life happens— as it will for all of us—she is able to **pull out money tax-free** to use in any way she wants—from vacations to new cars, college tuition to home remodeling. Her money isn't locked-up in an IRA, 401(k) or even a CD. **Lindsay is living her life AND building wealth using THE SAME DOLLARS**—that's a real game-changer for almost any family, individual or business. Look at **year-2 ...\$13,295**. In **two years** Lindsay has **10X MORE CASH** than is in her **emergency fund** right now. Think she sleeps better at night?

Me too. And it gets bigger every year.

Note: It's easy to spot a **properly structured "770"**. Your **Money Pool** in **Year-1** should be around **70%** of the Annual Premium (to turbo-charge growth). Shown above in the 'Money Pool', in **year-1** you see **\$5,880** which is **75%** of \$7,800. This is a very good plan. **Safety. Certainty. Guaranteed Outcomes. ZERO taxes** as your funds grow.



"Nothing Beats This!"

— Lindsay D.

Children's Speech Pathologist

"Do what banks do"

ZERO taxes when you **pull out** funds, **ZERO taxes on your estate** when you die, and **ZERO taxes** on the money inherited by your family. **ZERO** is remarkably better.

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