

THE 8TH

ELEMENT™

INTEGRITY DEFINES US

Caring for the financial security of wealthy families requires diligent review, considerable skill and interpersonal insight. And when appointing advocates to serve those clients, you must carefully consider the capability, creativity and above all, integrity of those resources you endorse.

Let us introduce you to The 8th Element™, an innovative approach that leverages an uncommon level of capability and integrity to support the attorney in serving his or her client.

For over 28 years we have been engaged in the highest technical echelons of life insurance design, specializing in the needs of high net worth families. We seamlessly integrate into the operations of a select group of prominent estate attorneys to help protect their client experience, enhance their reputation and provide discrete, unparalleled support to their client families.



STEP 1: CAPABILITIES PRESENTATION

At our first meeting, we introduce you to our process in order to clearly delineate who we serve and how we can work together to **help your clients achieve their goals**. We also establish a clear line of communication so you remain apprised of all action steps and provide you with tools to help you discern potential best fit opportunities.

STEP 2: CLIENT INTRODUCTION AND ALIGNMENT

Together, we gather an understanding of the client's needs so we can ensure a successful engagement through sound alignment and effectively **tailor the experience to the client's unique situation**.

STEP 3: CLIENT MEETING AND FINANCIAL DIAGNOSTIC

We begin to build an in-depth relationship with the client based on capability, trust and integrity. We lead the client through a family financial diagnostic, like a physician examining a patient. Committed to our belief that **"Well informed is well insured"**, we welcome any and all questions the client might have and prepare him for the next steps.

STEP 4: LIFE INSURANCE AUDIT

Utilizing our **Advanced Insurance Diagnostic™**, we thoroughly review the client's life insurance profile to create an inventory of policy attributes including beneficiaries, owners, coverage and financial strength of the carriers. We then provide you with an executive brief so you can easily recognize any possible gaps in the client's portfolio.

STEP 5: RECOMMENDATIONS

Our findings and recommendations are delivered in the form of the **Solutions Matrix**, a diligent side-by-side comparison of proposed actions and the client's current holdings. We support the client in his decision-making and confirm our actions with you. Together, our collective solutions function cohesively for the benefit of the client.

STEP 6: UNDERWRITER ADVOCATE™

Leveraging an uncommon hybrid of specialized medical training and industry experience, we strive for successful implementation of the chosen solutions. This phase incorporates the use of our proprietary methodology, the **Underwriter Advocate™**, which was developed to facilitate the approval and issuance of new policies.

STEP 7: IMPLEMENTATION BRIEF

We supply you with a detailed analysis of the implemented solutions to keep on file so you can quickly reference what was **executed on the client's behalf and why**. We continue to monitor our strategy in case of changes and remain available to both you and the client for future consultation.



LEE SLAVUTIN

Lee Slavutin, MD, CLU has been providing life insurance strategies to high net worth individuals for over 28 years. Born in Melbourne, Australia, Lee graduated from Monash University Medical School and came to New York as the chief resident in pathology at Lenox Hill Hospital. In 1983, Dr. Slavutin entered the life insurance business. Lee's unique medical qualifications are an integral element of his specialty for managing substantial life insurance policies.

Through his years of experience Lee Slavutin, MD, CLU has developed his knowledge for working with a key audience which includes clients with:

\$25-500M in assets	Underwriting Challenges
Strong Families	Family Offices
Liquidity Needs	Family Businesses

Advisors for People With Extraordinary Lives

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