Life Asset Direct Presents

THE SECRET

SMART & WEALTHY INVESTORS

USE TO MAKE MONEY (EVEN IN A BAD ECONOMY)



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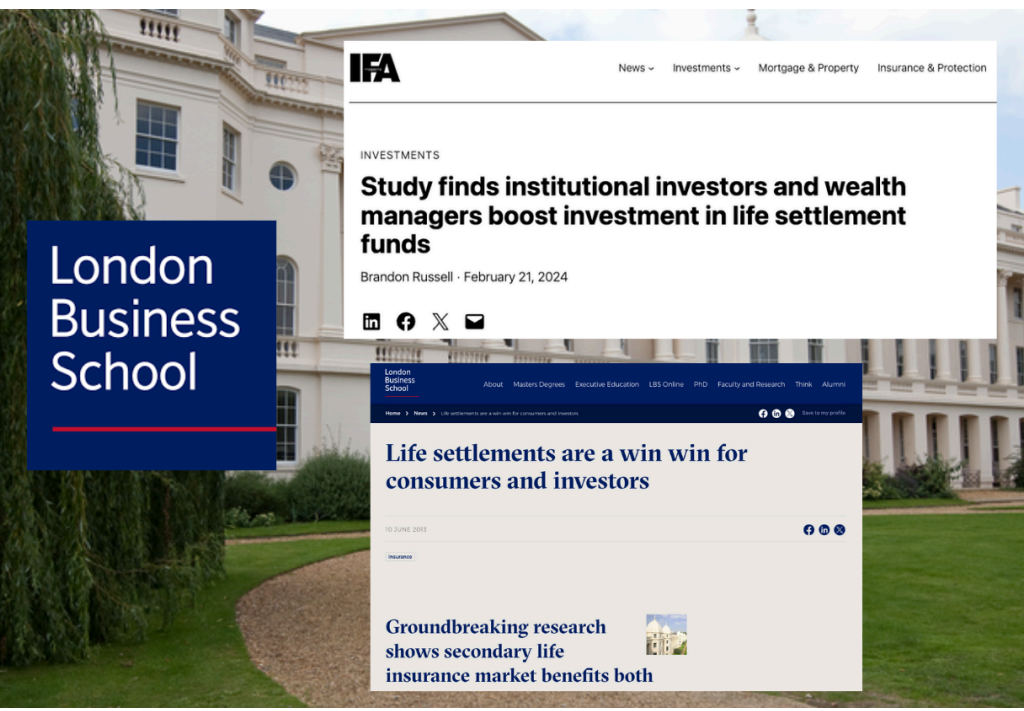
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ARE YOU TRULY DIVERSIFIED?

Before I share with you the little-known investment strategy the ultra-wealthy have been using for decades to grow their wealth even during market downturns, I want to clarify who this is for and set some expectations. This isn't some pitch for annuities or high-cost insurance policies.

My goal with this training is to share an opportunity with those who are seeking to add true diversification to their retirement. A strategy the legendary investor, Warren Buffett himself, has invested billions in, where a portion of your nest egg is insulated from economic downturns, market volatility, and global conflicts, and where you can still achieve competitive returns.



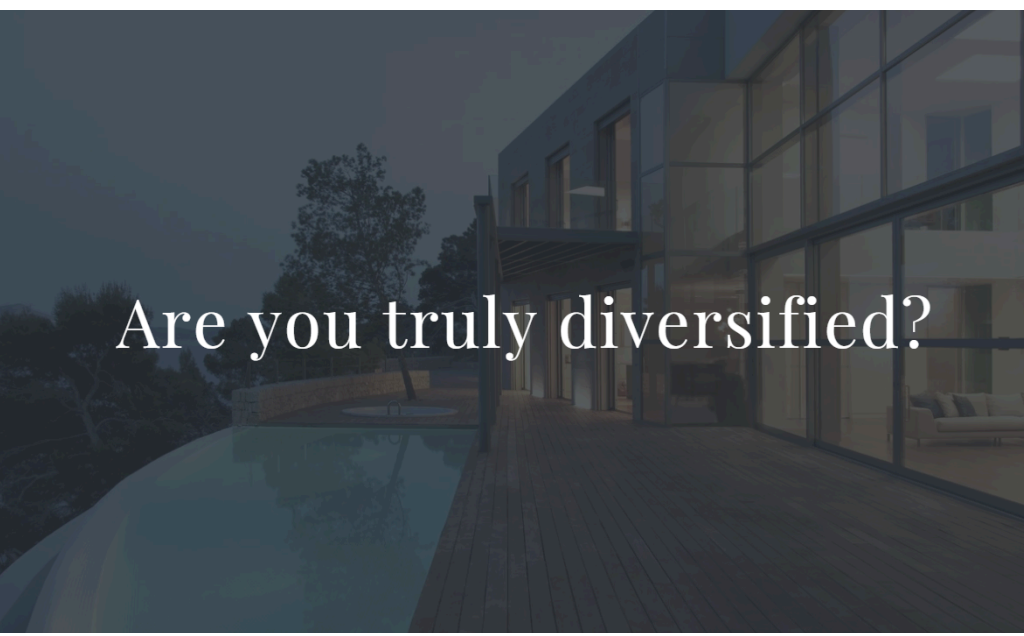
This marketing is intended for qualified investors who have the financial means, experience, and knowledge to make investments into complex and illiquid financial products. It is intended for educational purposes only and should not be construed as investment or financial advice. Review the offering documents for details.

IN FACT, RETURNS BY....

the London Business School, that have sustained over an average return of 12% annually. So without wasting any more time, grab a notebook and pen and let's dive in. Now let me quickly share a little bit of background on myself and my firm.

My name is Ben Mohr, and I'm a retirement strategist with nearly two decades of experience in the industry, and my mission is to help retirees achieve true diversification and competitive growth in their wealth, without being tied down to the products that many major investment firms force their advisors to push.

So, with that being said, I want to discuss an important subject, the main focus for today, and something that many retirees never fully consider...



THE DIVERSIFICATION DILEMMA

Most retirees are really only presented two cookie-cutter approaches to investing and they're the polar opposites of each other.

The first approach focuses on achieving returns, often through the stock market. While it can bring growth, it also exposes you to greater risk and potential losses.

Then the other, focuses on “safe investments.” And is a snuggly safe approach to preserve your capital, which can offer stability, but comes with low returns. And when you factor for inflation—the silent wealth killer—doesn’t actually grow your wealth. You may see small gains, but the rising cost of goods means your purchasing power is shrinking. Even blending these approaches often leaves you stuck in the middle—canceling out the benefits of each and bringing you back right to where you started.

Now, I’m not here to claim the stock market is bad. We know that’s not true, in fact, the market often performs well and great returns are possible in those years.

Nearly 66% of Americans have most of their nest egg in retirement accounts and stocks.



BUT HERE'S THE GLARING PROBLEM....

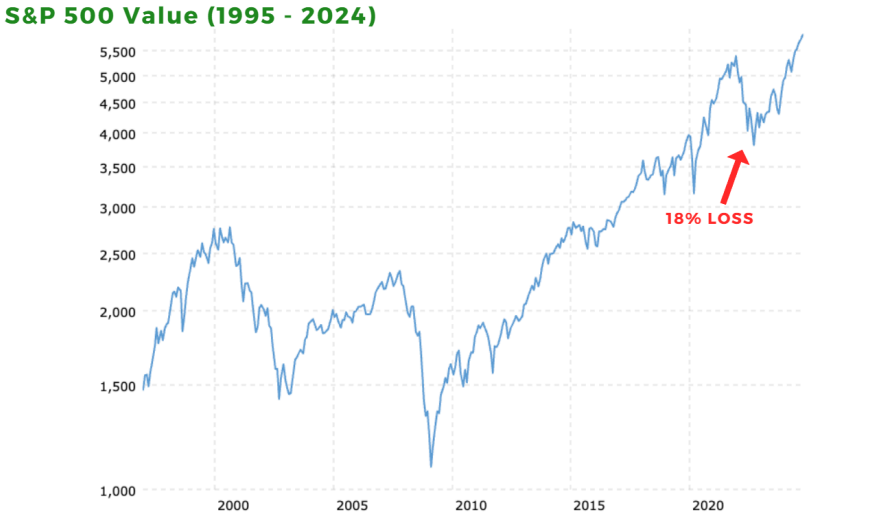
A recent study shows more than 66% of Americans nearly have all their money in retirement accounts and stocks. Yes, that's 2 out of 3 people with most of their nest egg riding on the market's ups and downs. Does this sound like true diversification? No, it doesn't.

The reason so many people have their retirement funds entirely in the market? Most retirement plans only offer market-based options—because that's how investment managers make their money. It's not that investors don't want diversification outside the market, they're often just unaware of other options. Many advisors either don't know about these alternatives, or they may not be incentivized to share them with you.

Advisors will claim their clients are "diversified" by moving funds within the market—across stocks, bonds, and mutual funds. But here's the flaw... every dollar is still at the mercy of market fluctuations. Sure, a "well-balanced" portfolio can perform well in positive years, but as history shows, markets have cycles. And if the market turns, so does every dollar in that portfolio.

In the past decade the Dow Jones and S&P 500 have had 3 negative years. In fact in 2022 the S&P dropped more than 18%. So, with a "well-balanced" market-based plan, do you think the average investor lost money by following this advice in 2022?

Chances are they did.



This isn't true diversification. True diversification means having a portion of your portfolio unaffected by the market swings— and where it will potentially make healthy gains and outpace inflation. So, you can see here a majority of people placing money in their retirement accounts have way too much money in the market and need a solution to be truly diversified.

The problem is when looking for alternatives to the market, many investors turn to safe options like CDs or annuities. These provide guaranteed returns and, in some cases, lifetime income which is ideal for building a “safe money bucket” in your portfolio. But too much reliance on these “safe” investments can lead to what we call an “over-correction.” While safe money offers stability, it comes at the cost of lower returns, limited liquidity, and lengthy surrender periods—often locking up funds for 10-15 years and potentially failing to outpace inflation. True diversification means balancing these safe options with growth-focused investments, but also adding a third layer: alternative investments. Alternatives provide a market-independent way to achieve competitive returns without being tied to the stock market’s performance or long lock-up periods.

LET'S LOOK AT WHAT A TRULY DIVERSIFIED PORTFOLIO WOULD LOOK LIKE...

John & Jane Smith's Ideal Portfolio

Covering All Three Buckets

Retirement Goals

- Sustainable income
- Wealth growth
- Diversification to offset market volatility

In this example:

Retirement Assets: $1,000,000

Stock Market Allocation:

65% of Total Funds

Safe Money Allocation:

25% of Total Funds

Alternative Diversification Allocation:

10% of Total Funds



$650,000 in Stock Market



$100,000 in Alternatives



$250,000 in Annuity

Diversified & Balanced

We will call these investors John & Jane Smith. They're 60 years old and have 1 million dollars in retirement assets. They want to achieve a well-balanced portfolio that is truly diversified. And to do this, they allocated $650,000 in the market, or 65% of their funds. This is their growth bucket focused on higher returns, but with higher risk. Then 25%, or $250,000, in a guaranteed income producing annuity.

This is their safe money bucket, providing secure, reliable income during retirement. Then 10%, or $100,000, in an alternative investment that isn't tied to the stock market and offers competitive growth potential without market volatility. This three-part approach—market, safe, and alternative— gives them balanced growth, income stability, and layer of protection from market downturns.

THE SMART & WEALTHY INVESTOR'S SECRET WEAPON

It's the strategy that investors like Warren Buffett have used for decades to achieve true diversification.

Warren Buffett, the "Wizard of Wall Street," and considered one of the smartest investors of all time has amassed a fortune through his cautious, profit-driven approach. For decades, he's placed billions into a unique alternative investment—one that provides true diversification outside of the stock market. This strategy has allowed him to hedge against market downturns, balancing out losses during market dips. Buffett and other institutional investors rely on this alternative to diversify their wealth, showing us that even the smartest money doesn't rely solely on the market.

Following The Smart Money

Senior Market Advisor

Warren Buffett

- Founder of Berkshire Hathaway
- Considered one of the greatest investors of all time
- Amassed a net worth of over $140 billion through his smart money management
- Has an entire division of his investment firm dedicated to this particular alternative investment

If life settlements are good enough for Warren Buffett shouldn't they be good enough for everyone else?



In fact, a study by the London Business School shows that institutional investors average more than 12% annually by just placing a portion of their money in this one asset. So yes, I'm sure you're asking, "What is this asset?" It's called Life Settlements and we've been the leader in bringing this investment to people like you for many years.

INTRODUCTION TO LIFE SETTLEMENTS

So what is a life settlement? A life settlement is when a senior citizen usually over the age of 75 decides to sell off their permanent life insurance policy to a third party.

Life Settlement Breakdown



Mr. Mike Brown

Retirement Circumstances

- Has owned a permanent life insurance policy for years
- Having health issues and family would like for him to have in-home care
- Doesn't qualify for long-term care
- Can't pull from retirement funds or mortgage as it adds too much risk

In this example:

Life Insurance Policy: $1,000,000

Annual Maintenance Cost: $50,000

Current Age: 80 Years Old

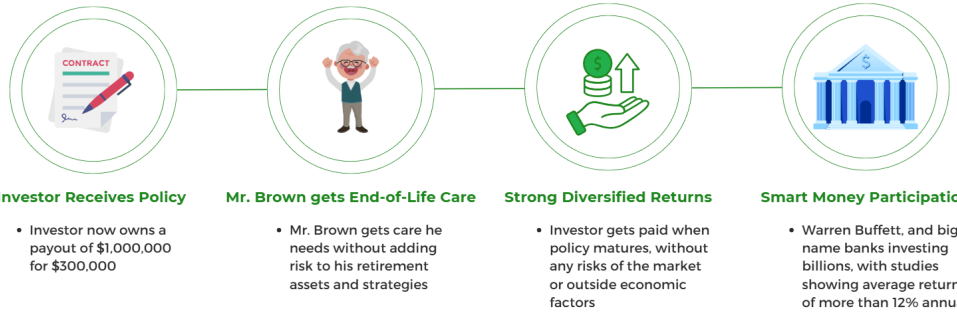
In-Home Care Cost: $50,000

Here's an example: 80 year old Mike Brown owns a 1 million dollar permanent life insurance policy which costs him $50,000 a year in annual premium to maintain. Recently, he's had some health issues and his family wants to arrange in-home care, which would add another $50,000 per year in expenses. Unfortunately, he doesn't qualify for long-term care assistance. So, Mr. Brown's family has a tough choice here on where to get that money to pay for this in- home care. Should they drain bank accounts, retirement funds, or even remortgage his house to cover the costs? All three options risk depleting essential funds, adding risk, and tapping into retirement accounts would bring significant tax consequences. This is where a life settlement is a perfect solution.

Mr. Brown can sell his policy for a lump sum now, covering his care needs without tapping into other savings, getting rid of the $50,000 a year payments to maintain the policy, and covering his care needs without tapping into other savings. Instead of waiting for a benefit his family will only receive after his passing, he can use those funds today to ensure quality care.

Mr. Brown can sell his $1 million policy to a third-party investor for approximately $300,000. This $300,000 will cover 5 to 6 years of in-home care, providing immediate relief without draining bank accounts or taking out a mortgage on his home. And at 80 and in poor health, this approach gives him the care he needs now, while protecting his other assets for his family. It's a win-win solution—immediate funds for care, with no impact on retirement savings or home equity.

Win-Win Scenario



As we mentioned Mr. Brown is selling his policy to a third party, right? Well for decades, this alternative investment was reserved for the ultra-wealthy investors and big banks—completely out of reach for the average investor.

Why? Because the entry price to buy policies was in the hundreds of thousands of dollars… an amount few could afford. Elite investors used life settlements as a powerful

hedge, diversifying their portfolios with an asset that has no correlation to stock market risks and remains stable despite economic shifts, political upheaval, or global events. Now, this once-exclusive strategy is available to individuals like yourself, providing a unique opportunity to diversify with an investment that is proven to aid in wealth creation for decades prior.

Here's why life settlements are a win-win. Mr. Brown gets the cash he needs for end-of-life care without draining his retirement savings or taking on debt. Meanwhile, the investor gains a payout from the policy when it matures. This is exactly why Warren Buffett and major banks have poured billions into life settlements, averaging returns over 12% annually. Why? Because this strategy bypasses market ups and downs, offering diversification and growth. And here's the great news… this investment strategy, once reserved for the ultra-wealthy, is now accessible to you. Let's see how you can benefit from the same powerful strategy.

Here's how this investment is structured.

Diversifying Even Further

	Policy Number	Face Amount	Insurance Company	Age & Gender	LE Months	Policy Maintenance Reserve Months	Policy Maintenance Reserve Amounts	Estimated Return
A	VF80097710	$ 1,000,000	Pacific Life	80M	60	60	$ 167,613	60%
B	1502698659	$ 625,000	Midland National	78M	65	65	$ 86,973	65%
C	BU1034120	$ 2,000,000	United of Omaha	75F	98	98	$ 102,589	98%
D	7167157	$ 750,000	Lincoln National	83M	44	44	$ 131,664	44%
E	SC1187653X	$ 1,625,000	Reliastar Life	77F/77M	91/52	91	$ 9,100	91%
	Total Face:	**$ 6,000,000**				**Total Reserve:**	**$ 497,939**	

Each portfolio offers 5 policies at a time, typically with ages ranging from 75 to 83 years old and life expectancies usually ranging from about 3.5 years to around 8 years.

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This is a $750,000 policy on an 83-year-old male, with a life expectancy of 44 months or about 3.5 years, with a 44% estimated return.

	Policy Number	Face Amount	Insurance Company	Age & Gender	LE Months	Policy Maintenance Reserve Months	Policy Maintenance Reserve Amounts	Estimated Return
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This next policy is $1 million on an 80-year-old male, with a life expectancy of 60 months (5 years) and an estimated return of 60%.

And this policy here is $2 million on a 75-year-old female, with a life expectancy of 98 months (about 8 years) and an estimated return of 98%. You will notice a pattern...

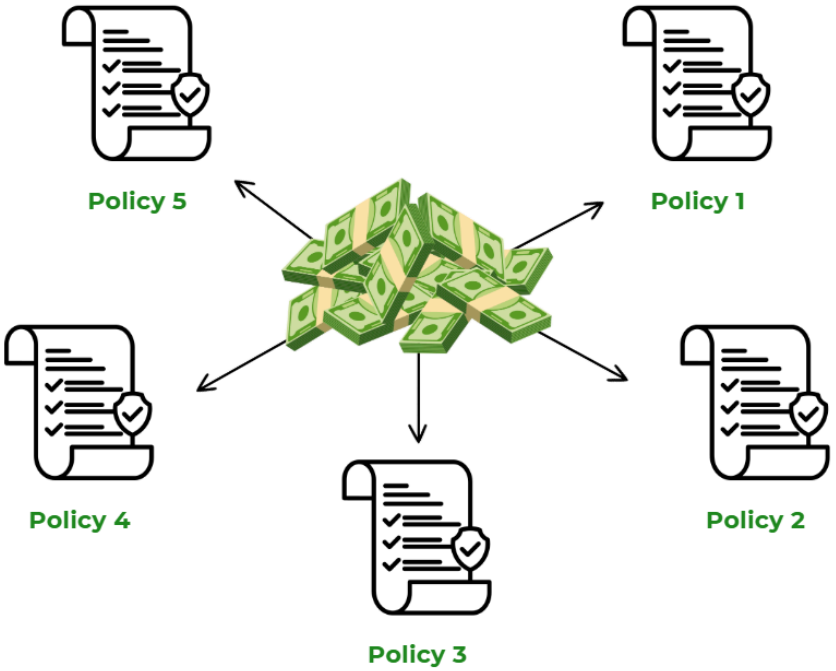
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the shorter the expectancy on a policy the lower the estimated return and the longer the expectancy the higher the estimated return.

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This mix of policies balances risk and return beautifully, offering stable growth potential uncorrelated to the stock market. With policies in the $500,000 to $2 million range and expectancies roughly between 4 to 8 years, you're investing in a well-rounded portfolio that leverages time and value.

This mixture is how you take diversification to the next level. When you invest in that portfolio, your capital is divided across all 5 policies.



This means you own a portion of the death benefit from each policy, so rather than being tied to just one, you're diversified by the returns of five separate policies. This layered diversification helps reduce risk even further. Plus, splitting your investment across multiple policies allows you to start with smaller portions, making this a flexible and accessible addition to your overall strategy.

John & Jane Smith's Ideal Portfolio

Covering All Three Buckets

Retirement Goals

- Sustainable income
- Wealth growth
- Diversification to offset market volatility

In this example:

Retirement Assets: $1,000,000

Stock Market Allocation:

65% of Total Funds

Safe Money Allocation:

25% of Total Funds

Alternative Diversification Allocation:

10% of Total Funds



$650,000 in Stock Market



$100,000 in Life Settlements



$250,000 in Annuity

Diversified & Balanced

Let's look back at how Jane and John are truly diversified at age 60: 65% of their retirement is in the stock market for growth, 25% in a lifetime income annuity ensuring they have secure, predictable income, and 10% in life settlements, an alternative that provides growth with zero stock market exposure.

And why life settlements?

They want competitive gains outside of market risk and don't want to lock up their funds in long 10- to 15-year surrender periods. With $100,000, buying a full policy like Warren Buffett or big banks isn't realistic. Plus, investing in a single policy lacks the balance they're looking for. So instead, they opted for a professionally-managed portfolio of 5 policies. Here's the advantage: as each policy matures, they'll receive payouts over time instead of waiting on one large sum. This means they have five separate payout opportunities potentially over the next 4 to 8 years—keeping their returns consistent and diversified. Let's take a look at how these payouts work...

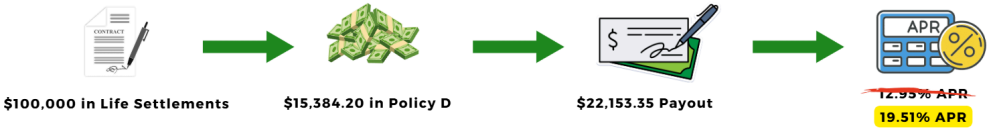
Let's revisit the $750,000 policy on the 83-year-old male with a 44-month life expectancy.

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By allocating $15,384.20 from their $100,000 investment into this policy, the Smiths stand to earn a 44% estimated total return when it matures, which amounts to $22,153.35. That's a 12.95% annual return if it matures in 44 months. Now, here's the real power of this setup: if the insured passes away sooner, say in 2 years, the payout remains the same at $22,153.35, but the return jumps to a 19.51% APR.

Policy Diversification Breakdown

	Policy Number	Face Amount	Insurance Company	Age & Gender	LE Months	Policy Maintenance Reserve Months	Policy Maintenance Reserve Amounts	Estimated Return
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Let's look at one of the other examples with a longer life expectancy. The Smiths will also invest $29,936.02 of their $100,000 investment into a $2 million policy of a 75-year-old female, expected to mature in about 8 years.

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$100,000 in Life Settlements **$29,936.02 in Policy C** **$59,075.31 Payout** **8.94% APR**

If she passes around that time, they receive $59,075.31, which is a 98% total return with an 8.94% APR. And yes, it's the same amount even if she passes away early. If the insured passes away in 4 years, the Smiths still get the exact same amount, $59,075.31, but their APR would increase to 18.74%.

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$100,000 in Life Settlements **$29,936.02 in Policy C** **$59,075.31 Payout** ~~8.94% APR~~ **18.74% APR**

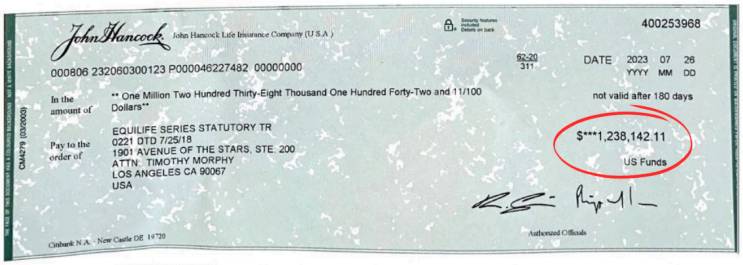
As you can see, the earlier a policy matures the higher annual percentage return, or APR, you earn. While longer durations reduce APR, our life expectancy estimates are calculated by expert physicians. However, they are still expectancies not guarantees. That's why spreading your investment across 5 policies is the smart approach. It balances timing risk—some policies may mature earlier, some later—but this diversity helps aim to ensure strong, steady returns overall.

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Now you may wonder, do policies actually mature early? The answer is yes, and here are some recent cases where investors realized early gains and true diversification.

This $1.2 million policy had a 74-month life expectancy with a 74% estimated return, but the policy matured early at just 24 months. This meant investors made an overall 74% on their money in just 24 months, resulting in an average annual percentage rate (APR) of 33%.

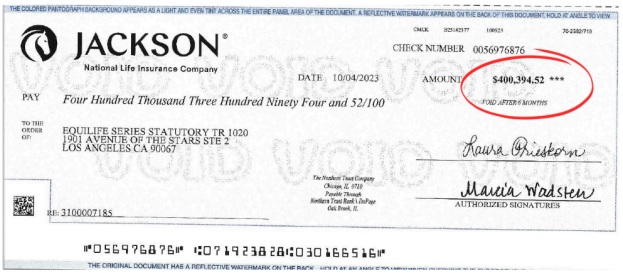
Early Maturities





74-Month Expectancy → 74% Overall Return → 24-Month Maturity → **33.00% APR**

Here's another early maturity. This $400,000 policy had a 54-month life expectancy but matured early at only 32 months. So, investors made an overall 54% on their money, but in just 32 months for an annual percentage rate of 18%.

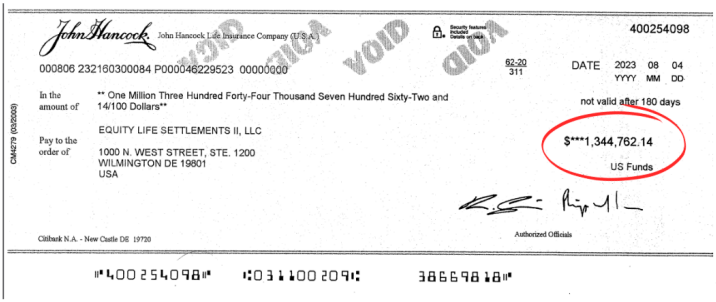




54-Month Expectancy → 54% Overall Return → 32-Month Maturity → **18.00% APR**

Note: Capital calls can become necessary, and due to the fact that life expectancies cannot be guaranteed, returns may take longer than expected to be realized. Review the offering documents for details.

And this $1.3 million policy had a life expectancy of 74-months, but again matured early at 18 months, so investors saw an overall gain of 74% in just 18-months for an annual percentage rate of 46%.


John Hancock Life Insurance Company (U.S.A.)

400254098

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62-20
311

DATE 2023 08 04
YYYY MM DD

In the amount of ** One Million Three Hundred Forty-Four Thousand Seven Hundred Sixty-Two and 14/100 Dollars**

not valid after 180 days

Pay to the order of EQUITY LIFE SETTLEMENTS II, LLC
1000 N. WEST STREET, STE. 1200
WILMINGTON DE 19801
USA

$***1,344,762.14
US Funds

Citibank N.A. - New Castle DE 19720

Authorized Officials

⑈400254098⑈ ⑆031100209⑆ 3866981818⑈



74-Month Expectancy → 74% Overall Return → 18-Month Maturity → 46.00% APR

Early maturities like this drive strong returns, though occasionally, some policies go longer. This is why we spread the funds across 5 policies—to balance returns and manage timing risks. And the results speak for themselves. Clients enjoy attractive returns, true diversification, and peace of mind from using a small portion of their portfolio outside the market's volatility. This approach is exactly what Warren Buffett and major banks have leveraged for decades. Now, it's available to you, to create a truly diversified portfolio.

Note: Capital calls can become necessary, and due to the fact that life expectancies cannot be guaranteed, returns may take longer than expected to be realized. Review the offering documents for details.



HOW TO INVEST

So how can you invest? For non-retirement funds, the minimum investment is $10,000 and the funding process is simple, either through a bank wire or check. And yes, you can use retirement funds as well. The minimum for retirement funds is $25,000. In fact, around 70% of our investors are using retirement funds to purchase life settlements. Using retirement funds is a smooth, tax-efficient process. There is no taxable event while your investment grows. Just like with any returns in your current retirement account, the growth is tax-deferred. And if you're investing through a Roth IRA, the returns are actually tax-free.

How Can I Invest?

Non-Retirement Funds

- Minimum investment of $10,000
- Can invest through a wire or write a check to invest

Retirement Funds

- Minimum investment of $25,000
- Can invest directly from IRA, Roth, 403b, 401k, TSP, etc.
- Investment is tax-deferred

Simple, transparent, and clear paperwork process of all details

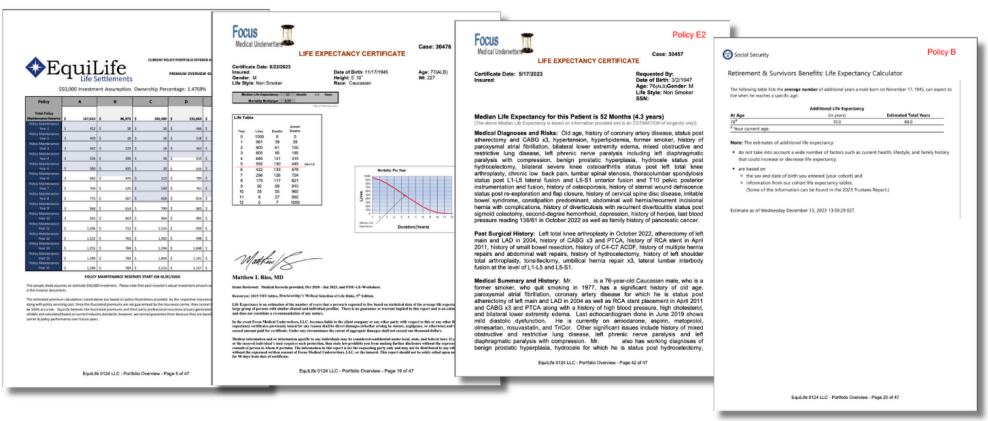
When you invest with retirement funds, we'll guide you in repositioning from your IRA, Roth, 401k, TSP, or other retirement accounts into a new self-directed IRA. This lets you stay within your retirement structure while adding this unique, market proof asset. It's all designed to blend seamlessly into your current setup, making diversification with life settlements accessible and straightforward.

Note: Prospective investors should consider carefully investment objectives, risks, charges and expenses, and should consult with a tax, legal and/or financial advisor before making any investment decision.

Now, the process is 100% transparent. First, all funds are held by First Western Trust Bank—a publicly traded bank on the Nasdaq, they are a member of the FDIC, with decades of experience.

When you invest, you'll receive a certificate of ownership detailing your share in the portfolio and your exact percentage of each policy's benefit. Before you even decide to invest, we provide you a thorough report on each insured's health history, family background, and how doctors arrived at their life expectancy.

Health & Policy Report



You'll have full access to these reports and agreements well in advance, so you can review everything and address any questions.

This level of transparency is all designed to give you the confidence and answers you need, knowing exactly where your money is going.

Note: Investors must realize there is a possibility some or all of their policies could go past life expectancy, thus lowering their overall return. Further premiums for the portfolio will also affect the estimated return. A further example of this is listed on the Portfolio Overview "Explanation of Life Settlement Portfolio" (Page 6).

TAKING THE NEXT STEP IS SIMPLE

So today we've covered how you can achieve true diversification by investing part of your money away from the stock market just as the likes of Wall Street and ultra wealthy investors such as Warren Buffett. How you can still achieve steady, competitive returns without being tied to economic downturns, political uncertainty, or global crises. And add an extra layer of insulation to your retirement with no surprises. This isn't meant to replace your current plan, but to complement it—providing an opportunity for growth potential and diversification.

One that isn't tied to the stock market's ups and downs, can achieve competitive returns, and doesn't lock your money up in long surrender periods.

Now, you've taken in a lot of information today, and you have two options. Option one is you can take what you've learned and go at it alone. Read into tax laws, investment strategies, health reports and try to implement this on your own. But is that really something you want to take on by yourself? Or you can go with option two. You can take advantage of an opportunity, exclusive to our webinar attendees, to book a complimentary Market-Proof Investment consultation with our team.
And in your personal consultation, we'll conduct a personal review of your portfolio's structure to assess your market risk exposure, and identify any investments that are limiting your growth, or the worst performing 10% of your investments. We'll present a detailed case analysis based on this review of how your retirement portfolio could improve with an asset that offers true market diversification. And lay out the step-by-step plan to implement this and incorporate an asset that can

deliver competitive returns, free from the uncertainty of stock market swings. And this is at no-cost to you, and with no obligations. Simply contact us at the information provided below to set up a one-on-one consultation. We look forward to hearing from you soon.

Contact Info

(925) 895-5467

info@lifeassetllc.com

Click this link to book a one-on-one appointment

www.lifeassetllc.com

DISCLAIMER

This book is intended for general information purposes only and does not provide specific investment advice or recommendations for any individual. We recommend that you consult with your tax, legal, and/or financial services professional regarding your individual situation. The examples presented are hypothetical, and your results may vary. Life settlements are only available to qualified investors. As with any other investment, life settlements involve a degree of risk and are intended for sale to investors capable of assuming the risks involved with this product. Refer to the investment documents for a complete understanding of the benefits and risks involved prior to investing.

