



Recruit, reward and retain: benefit by planning with bizStream.

With your guidance, your business clients can create a comprehensive benefits package that provides employees with the peace of mind they need to achieve their financial goals.



Buy-Sell & Key Person Planning

Help business owners protect their company, partners, and continuity in the event of the unexpected loss of a key employee or owner.



Retirement Planning

For business owners seeking to create a potential tax-free income stream, post-exit retirement.



Golden Handcuff

A Stream policy helps retain top executives by providing benefits tied to a customizable vesting schedule.



Key Benefits

- Company balance sheet is not impacted
- Potential tax-free retirement income
- Death benefit protection
- Access to potential tax-free chronic and critical illness funds
- Protection against market losses
- Terminal illness
- Executive bonuses
- Succession planning
- Partner buyout



Connect with Us! Email us at service@thestreamplan.com

The Stream Protection Plan is designed for accredited investors and is not suitable for all clients as it involves some risks. The indexed universal life insurance policy used is issued by a third-party Life Insurance company and involves both guaranteed and non-guaranteed elements. Policy performance and financing terms are not guaranteed. Illustrations and projections are hypothetical, for educational purposes only, and do not guarantee future results. Actual outcomes may differ materially. This material is not tax, legal, or investment advice. Please consult your independent advisors.



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