Stream Quick Fact Sheet

Stream Minimum Contribution Requirements Per Age Brackets

- Ages 1–17: $5,000/yr for 5 years
- Age 18+: $20,000/yr for 5 years

Leverage Ratios Used Per Age Brackets (Years 1–5 of Policy Contributions)

- Ages 1–39: 70% / 30% Split (Bank / Client)
- Ages 40–49: 60% / 40% Split (Bank / Client)
- Age 50+: 50% / 50% Split (Bank / Client)

Years 6–10 the Bank Contributes 100% of Premium

Trust Structure:

- All policies are written out of the state of Arizona
- Stream is the Trustee and beneficiary of the policy until the bank loan is repaid
- Policies are issued in Tranche format, with each policy standing on its own within the Tranche
- Clients become the Trustee of their Trust and Stream is removed as Trustee when the bank loan is fully repaid

Member Qualification

Must make at least $300,000 of income or have at least $1 Million of assets excluding their primary residence

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Stream Quick Fact Sheet

Agent Licensing

All Stream Agents must be licensed in the state of Arizona

Compensation Split

- Writing Agent goes on the application for 75%
- Stream goes on the application for 25%
- Commissions are spread over depending on the carrier

Stream Designs

- Income
- Death Benefit Only
- Survivorship (Second to Die)
- Allow for 1035 Exchange capability

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

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