



A new way to protect the present. A new way to secure the future.

Quiet strategies.



Loud legacies.

May 2026 Insights for Your High-Net-Worth Clients

The wealthiest families don't build noisily. They build before anyone's watching, with structures most advisors never mention and most CPAs aren't trained to optimize. By the time the next generation inherits, the strategy has already done its work.

We're sharing a case study showing how one company used Stream to retain top talent and quietly build executive wealth through a Split Dollar Loan Regime, and the four-lens framework your HENRY clients are missing.

FEATURED CASE STUDY

"We needed something beyond salary — a benefit that would attract high-caliber executives, reward long-term loyalty, and offer real financial upside. Stream gave us a structure where the company keeps control and the executives quietly build serious wealth."

Mid-Sized Business · Executive Bonus Case Study

[Read the Full Case Study](#)

MAY CONTENT TO SHARE

- **One-Sheet: Recruit, reward and retain: benefit by planning with bizStream.**
PDF · [Share with a client](#)
- **Case Study: Executive Bonus & Split Dollar Loan Regime**
Article · [Share with a business owner](#)
- **Sign Up for Our Monthly Huddles: Wed. May 27 at 10AM PT**
Live · [Register to join](#)

HUDDLE RECAP · APRIL

Our first monthly huddle is in the books! Here's what advisors took away:

Walked away with a much clearer picture of the market this product is built for. Keep the knowledge coming.

Real, useful resources on the website and a sharper estimator make this an easy tool to put in front of clients.

Top to bottom, every piece of it landed.

NEXT HUDDLE · WED. MAY 27 · 10AM PT

If you missed April's session, this is the one to join.

Already registered? You're all set — no need to register again.

Save My Seat



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