Stream

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

Same dollars in...

different outcome.

June 2026 Insights for Your High-Net-Worth Clients

When a liquidity event lands, whether a business sale, an inheritance, or a windfall, most advisors treat it as a reinvestment question: where to park the proceeds. The wealthiest treat it as a leverage question. Same dollars in, a very different outcome.

This month's theme is The Liquidity Advantage. We're sharing a helpful case study showing how one business owner skipped the bank loan and funneled his exit proceeds into Stream instead, turning the same annual contribution into more than double his designed-to-be-tax-free retirement income, plus a larger tax-free death benefit for his children.

FEATURED CASE STUDY

> *"Why would you use a tax-free asset to pay back a bank loan? You want your retirement fund to keep growing for you."*
>
> Tim Whitmore · Co-Founder, Stream

SAME $50K/YEAR IN · TWO VERY DIFFERENT OUTCOMES

$135K/yr	**$305K**/yr
Standard bank-loan strategy	Liquidity event funneled in

Designed-to-be-tax-free retirement income, ages 65–120. Sample analysis.

Read the Full Case Study

JUNE CONTENT TO SHARE

- **Case Study: Leveraging a Liquidity Event to Supercharge a Stream Plan**
  Article · Share with a business owner

- **How the Stream Model Works: Contributions, Leverage & the Zero-Percent Floor**

  Explainer · Share with a prospect

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