



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

Sophisticated planning



for a more secure future.

April 2026 Insights for Your High-Net-Worth Clients

Your clients are earning more. But they're also carrying more, more tax exposure, more complexity, and more uncertainty about whether the strategies they've relied on are still doing enough.

The Stream Protection Plan was built for exactly this moment. This month, we're sharing a real member story, the 401K conversation worth having with every high-income client, and a major announcement about a new carrier relationship that expands what we can bring to you.

As always, no filters. Just the strategies your clients deserve to know about.

FEATURED CASE STUDY

"You are a parent or grandparent with a vision for your legacy, know that there are better options than locking up capital in rigid plans. Life insurance, when designed correctly, gives you flexibility, control, and impact."

Stream Members, Northridge CA

Life insurance is often misunderstood and underutilized. For wealthy families, it can do far more than simply provide protection in the event of premature death. When used strategically, life insurance becomes a powerful planning tool; one that aligns with how affluent individuals think about time, leverage, taxes, and legacy.

[Read Case Study & Insights](#)



BIG NEWS: We're excited to share that even more is on the horizon! Next month, we'll be announcing big news: the addition of a new carrier relationship that expands the solutions we can bring to you.

APRIL CONTENT TO SHARE WITH YOUR NETWORK

Share this with a client who's thinking about legacy, taxes, or retirement. It's a straightforward read on why high-net-worth families are leveraging premium

financing.

PDF · SHARE WITH A CLIENT

"Why High Net-Worth Families Are Leveraging Premium Financing"

[View PDF](#)

JOIN OUR MONTHLY "HIGH NET WORTH HUDDLES" STARTING APR. 29



Register for our monthly sessions for actionable insights on **tax-efficient income, liquidity, protection, and more!** We're meeting the last Wednesday of every month at 10AM.

[Register for our Monthly Huddles](#)

ADDITIONAL RESOURCES



[READ ON THESTREAMPLAN.COM](#)

ARTICLE

**Understanding Premium Financing:
How It Works & Where Stream Fits**

[thestreamplan.com](#)



[READ ON THESTREAMPLAN.COM](#)

ARTICLE

**A Strategy for Pursuing Tax-Free
Income**

[thestreamplan.com](#)

[Connect With the Stream Team](#)

An Asset You Can Bank On



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