



Senior Money News & Views

November 2006

Grandparents

The Gift Givers of all time

“This Holiday Season give the gift that keeps on giving”

Grandparents are buying Income Annuities for grandchildren who are in college...it's a monthly income for 4, 5, or 6 years. And for some the monthly checks continue for a while after graduation while they are getting established in their careers.

The monthly check from the annuity company made payable to the grandchild can be mailed directly to the grandchild or mailed in care of the grandparent who forwards the check, monthly, creating a forever lasting memory.

Just imagine this phone call:

Grandchild, “Hello grandma...are you okay, I haven't heard from you, just want to make sure you're okay?”

Grandparent, “I'm doing okay...don't worry, the check is in the Mail.”

Some grandparents are putting some of their Keepsake Money into Senior Modified Endowments creating a Family Treasure for the benefit of their grandchildren, now that's a legacy optimizer that is income tax free and probate free to the grandchildren.

*Every year
The Gift Giver of The Year Award
goes to Grandparents*

