



BUY-SELL DISABILITY POLICY ALTERNATIVE INVESTMENT FIRM

Client

Five partners of a young successful Chicago investment firm valued at almost \$40 million.

Situation

The advisor was asked to provide disability buy-sell coverage to fully fund their buy-sell agreement after 18 months of disability.

Assessment

All five partners, in their late 30s and early 40s, worked with the advisor on the case to create a plan that would afford them both time to recover from a debilitating event or diagnosis, and reduce the cost of funding their agreement.

Solution

The Balaban Group designed a buy-sell disability solution to fully fund the buy-out agreement in the event one of the five partners of the firm becomes permanently disabled.

Result

The partners of the investment firm could rest easy knowing a real solution was in place in the event one of them became disabled. Furthermore, they were able to market their succession plan promoting the firm's stability and establishing trust while courting new investors.

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