

# INSURE YOUR LEGACY

## GUIDELINES FOR ASSOCIATED MATCH LIFE INSURANCE PROGRAM



Policies with a face value of at least \$100,000 are eligible.



Only Universal Life policies, with a no-lapse guarantee rider to age 120 will be eligible.

# A

Carriers must be rated with a minimum "A" rating by A.M. Best.



Illustrations must contain an Internal Rate of Return (IRR) calculation.



At the end of the contract, the portion of the death benefit paid for by The Associated must be allocated to The Associated's unrestricted endowment. The remaining proceeds must be directed to The Associated for permanent endowment, but may be designated for a specific purpose.



The **Associated**  
PHILANTHROPIC PLANNING  
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### FOR MORE INFORMATION,

contact Jacqueline Fuchs Yahr at [jyahr@associated.org](mailto:jyahr@associated.org) or 410-369-9248, or Michael Friedman at [mfriedman@associated.org](mailto:mfriedman@associated.org) or 410-369-9233.

[associated.org/lifeinsurance](http://associated.org/lifeinsurance)

# MATCH OPTION 1

The policy must be paid up in no more than three years. A maximum of \$60,000 per policy will be matched.

- For a three-year premium policy, you pay the entire first year premium, The Associated will match up to \$20,000 of the second-year premium, and The Associated pays up to \$40,000 of the third-year premium.
- For a two-year premium policy, you pay the first-year premium and The Associated pays up to \$60,000 of the second-year premium.
- For a single premium policy, The Associated pays half of the premium, up to \$60,000, and you pay the balance.

# MATCH OPTION 2

The policy must be paid up in no more than five years. A maximum of \$50,000 per policy will be matched.

- For a five-year premium policy, The Associated will match up to \$10,000 per year for a period of five years.



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