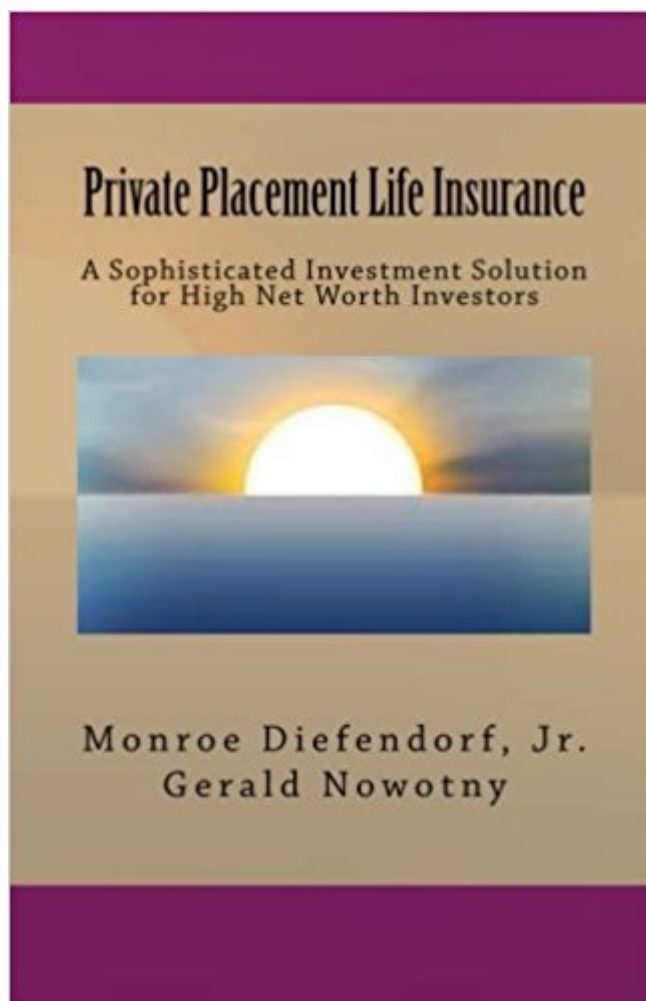


The book was found

Private Placement Life Insurance



Synopsis

A primer for understanding Private Placement Life Insurance (PPLI).

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Customer Reviews

Monroe "Roey" Diefendorf, Jr. is a 45 year veteran wealth manager in Locust Valley, NY. Roey has a Masters in Insurance from Georgia State University. He has his undergraduate degree from Bucknell University in Psychology and has completed the CLU, ChFC, RFC, CFP, CIMA and CAP designations. Roey has developed his national reputation in the "total" wealth management arena with the introduction of two books "3 Dimensional Wealth: A Radically Sane Perspective On Wealth Management" and "A Better Way: Using Purposeful Trusts To Preserve Values & Valuables In Perpetuity". Roey founded both Argonne Trust Company, Inc. (SD) and the Monroe Insurance Dedicated Funds (DE) bringing values based solutions to the domestic PPLI marketplace.

Too small

It's a small book but big on content. Eye-opening! Provides the nuts and bolts on how to accumulate and preserve wealth. It was an exciting read for me. I know someone who has worked on Wall Street for 15yrs and they had never heard of these strategies. A secret gem of a book!

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