



THE POWER OF LION STREET

Lion Street is a national network of elite firms and financial professionals that are considered for all large life insurance transactions in their marketplace. Our firms provide sophisticated solutions in coordination with other trusted advisors to high-net-worth and corporate clients.

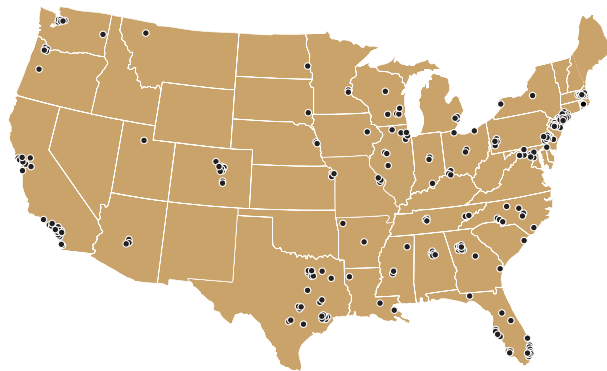
NATIONAL NETWORK:

175+ FIRMS

750+ PRODUCERS

160+ CITIES

40+ STATES



\$185M+ Target Premium

\$450M+ Total Premium

\$25B+ Total Death Benefit

400+ Cases Over
\$100K of Premium

\$3.2M Average Face Amount

Lion Street results listed are for year-end 2022.

OPEN ARCHITECTURE

Experience and expertise, combined with a true open architecture platform, gives our Firms access to all major products as well as sophisticated resources needed to design advanced solutions.

Our open architecture enables:

- Significance, influence and access to all major carriers
- Complete objectivity and product-agnostic advice
- No proprietary products

WHO WE SERVE

- High-Net-Worth Clients
- High Income Earners
- Family Offices
- Financial and Trusted Advisors

EXPERIENCE AND EXPERTISE

Our experienced team provides life insurance expertise, guidance, and customized financial planning solutions as part of a holistic planning strategy to help you and your clients succeed.

- Wealth Transfer/Estate Planning
- Life Insurance Strategies/Analysis
- Charitable Giving
- Business Succession Planning
- Corporate and Business Insurance

- Specialty Expertise with Private Placements, Insurance for Foreign Nationals, and Premium Finance

HOW WE ADD VALUE TO YOU AND YOUR CLIENTS

Your clients look to you as a trusted resource: someone who will guide them through challenges, choices and risk to find optimal solutions in your area of expertise.

By working with Lion Street, you offer clients access to a robust offering of high-quality financial products and some of the brightest minds in our industry.

LION STREET

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