



# The Business Resource Center

We strive for excellence every day and in every interaction, as we provide you and your clients with custom-tailored planning solutions for their business and personal needs.

Toll-free: 800 871 7780, option 3 | Email: [brcas@glic.com](mailto:brcas@glic.com)  
[guardianonline.com/brc](http://guardianonline.com/brc)



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## Our cornerstones

### Expertise

We are a team of Attorneys, CPAs, CLUs, ChFCs, and tax experts who have over 255 cumulative years experience in the advanced planning markets.

### Strategy

We know you, and your markets, and craft strategic plan designs and approaches to help you meet the challenges you face.

### Innovation

Guardian's culture of innovation is embodied in the BRC — we use our experience and knowledge to craft innovative solutions to meet your clients' needs.

### What we do

At the BRC, we are highly trained and knowledgeable professionals in all areas of advanced business, individual, and wealth transfer planning. Our expertise covers a wide range, including:

#### Business planning

##### Succession Planning

- Buy-Sell Planning
- Insurance Only LLCs
- Disability Buyout Insurance
- Key Person Life and DI

##### Non-Qualified

##### Executive Benefits

- Executive Bonus Plans
- Supplemental Executive Retirement Plans
- Non-Qualified Deferred Compensation
- Split Dollar

#### Individual and family planning

##### Wealth Transfer Planning

- Estate Tax Planning
- Inheritance Equalization
- Wills and Trusts
- Generation Skipping Planning
- Family Limited Partnerships
  - Commercial Premium Financing
  - Private Financing/ Split Dollar
  - Special Needs Planning
  - Charitable Planning
  - Life Insurance as Supplemental Retirement Income

## Our relationships

The BRC only partners with the best. We offer you relationships with some of the best names in the field, including:

- BakerHostetler, nationally renowned law firm
- BizEquity business valuations
- BEI Exit Planning Solutions

## Our services

We're here to help you and your clients, by making the complex simple and providing top-notch case consultation and design services. The following are just a few of the things we can do for you:

- Advanced Concept Review
- Case Consultation
- Case Design and Presentation
- Will and Trusts Review
- Buy-Sell Plan Review
- Key Person Plan Review
- Charitable Planning Support
- Sample Documents

## Our tools

Guardian gives you access to the tools you need to do the job, such as:

- The Guardian Proposal System — 20+ advanced concepts
- The Living Balance Sheet — our hallmark planning software
- NumberCruncher Financial Planning Tool
- Advanced Markets Online

## Who we are

Our team features some of the foremost analytical minds in the financial industry, to provide you with the strategic plan design solutions you are looking for.

**Toll-free: 800 871 7780, Option 3**

**Email: [brcas@glic.com](mailto:brcas@glic.com)**

### Thought Leadership and Case Consultation



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Premium Financing, Captive Insurance Companies, Non-Qualified Executive Benefits, Succession Planning



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Income Tax Planning, Buy-Sell Planning, Non-Qualified Executive Benefits, Estate Planning, LTC Rider Taxation



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### Case Design



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Succession Planning, Key Person, Non-Qualified Executive Benefits, PPIA Opportunities, Advanced Case Design Product Questions



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GPS Advanced Presentations, Executive Bonus Plans, Premium Financing, SERPs, Succession Planning, Split Dollar

### Business Development and Sales Campaigns



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End-to-End Sales Process, BRC Collateral, Advanced Sales Campaigns



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End-to-End Sales Process, BRC Collateral, Advanced Sales Campaigns

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