



## RESOURCES FOR THE **LOW INTEREST RATE ENVIRONMENT** eKit

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**Interest rates still remain low**—it's an environment ripe with strategies and marketing opportunities to enhance some clients' wealth transfer strategies, such as:

- Demand Loan Split Dollar
- Retained Interest Trusts
- Term Loans
- Irrevocable Grantor Trusts
- Asset Sales
- And more!

The concepts you can present to your clients, along with their tax and legal advisors, abound. Prudential is your resource for the tools and guidance you need to be successful, including when interest rates are low. The Low Interest Rate Environment eKit below contains the materials you need to review marketing ideas and to approach your clients.

### Review the Concept:

**AMI: Planning in a Low Interest Rate Environment**  
(0262116)

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**FAQ: GRATs and Sale to IDGTs: Estate Freeze Techniques** (0167649)

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**Grantor Retained Annuity Trust Presentation**  
(0259907)

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**Asset Sale to Defective Trust** (0259913)

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**Family Split Dollar Presentation** (0259922)

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**Split Dollar Presentation** (0262264)

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### Contact Clients and Prospects:

**Planning in a Low Interest Rate Environment  
Prospecting Letter** (0265377)

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### Meet with Clients:

**Understanding the Uses of Trusts** (0196407)

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**Grantor Retained Annuity Trust Brochure**  
(0266054)

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**Asset Sale to Defective Trust Brochure** (0265283)

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**Asset Sale to Trust: Bond Asset** (0265285)

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**Sale to Intentionally Defective Grantor Trust with Life  
Insurance Calculator** (0271831)

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