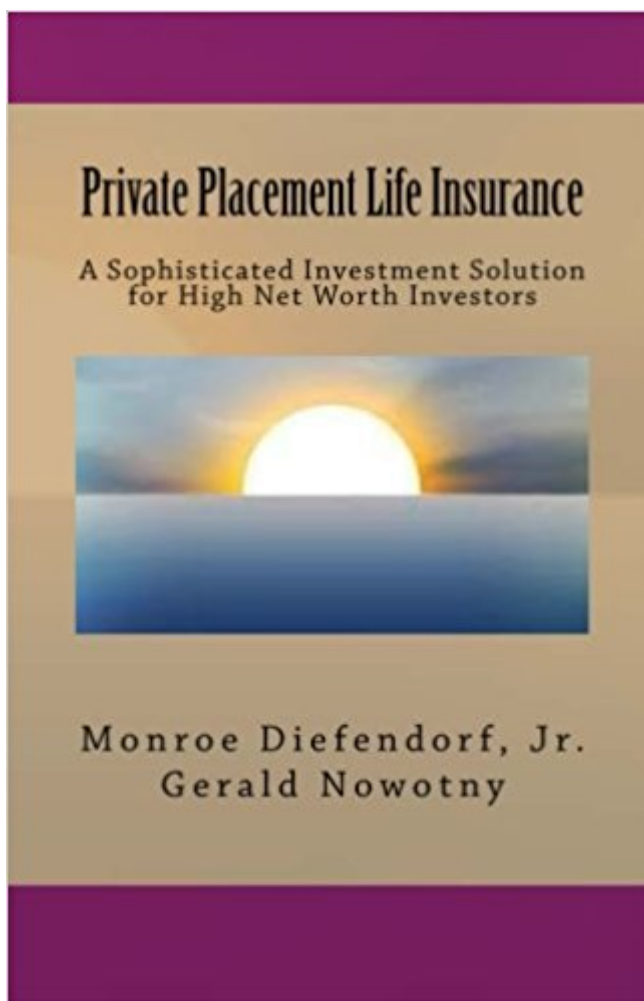




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Private Placement Life Insurance



Synopsis

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

Book Information

Paperback: 38 pages

Publisher: CreateSpace Independent Publishing Platform (September 18, 2015)

Language: English

ISBN-10: 1517418909

ISBN-13: 978-1517418908

Product Dimensions: 5.1 x 0.1 x 7.8 inches

Shipping Weight: 3.2 ounces (View shipping rates and policies)

Average Customer Review: 3.0 out of 5 stars 2 customer reviews

Best Sellers Rank: #1,249,920 in Books (See Top 100 in Books) #128 in [Books > Business & Money > Insurance > Life](#)

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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