

THE eR3 PLAN™ FACT SHEET

**SCHEDULE A FREE
30-MINUTE
INTRODUCTORY CALL**

Discover how private insurance can protect your assets, mitigate risks, and enhance your wealth.



**SCAN THE QR CODE
ABOVE OR SEND AN
EMAIL TO:**

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The Enhanced Roth Reinsurance Retirement Plan™ (“eR3 Plan™”) is a unique private self-insurance strategy for business owners with annual gross revenues more than \$500,000 to allow tax-deductible premiums, not subject to state insurance regulations, owned by a self-directed Roth retirement plan that allows tax-free withdrawals after age 59 ½.

What is Private Insurance?

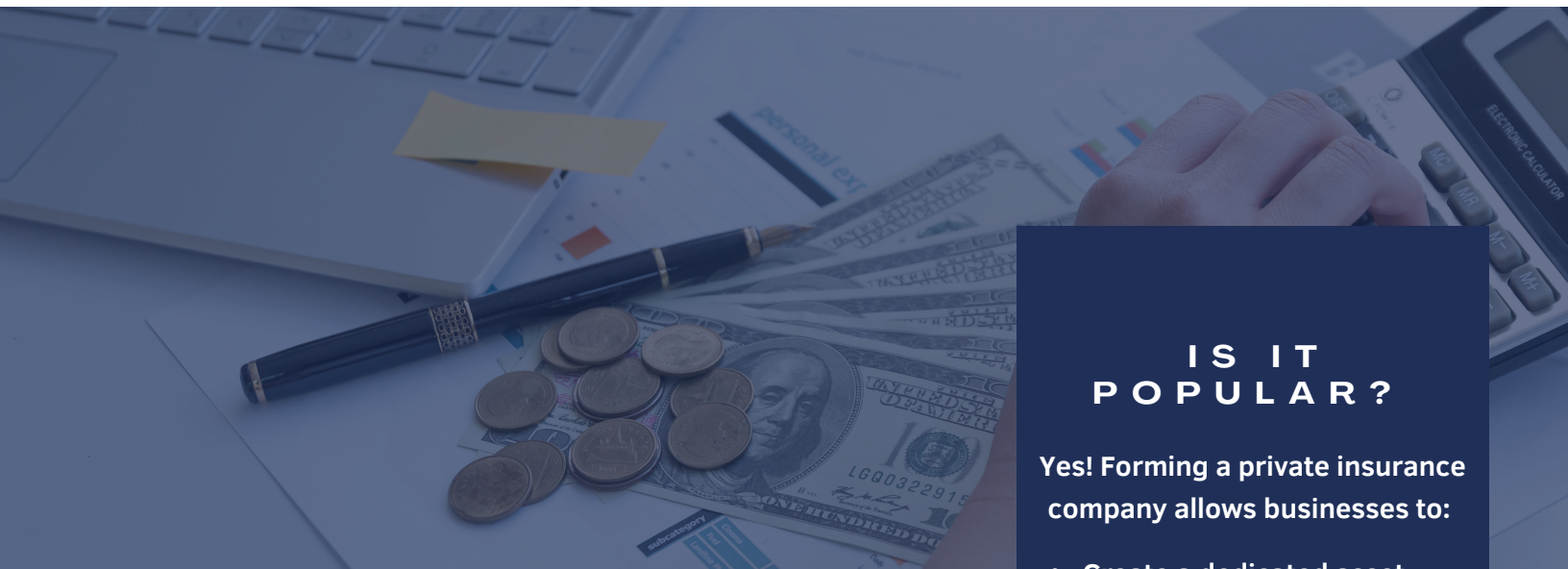
Private insurance empowers U.S. businesses to strengthen their risk position while benefiting from powerful planning opportunities. Business owners can self-insure their uninsured and under-insured risks, protect assets, and build wealth.

Coast-to-Coast Business Leaders are Leveraging Private Insurance

Private insurance, made popular by legislation passed by President Ronald Reagan and Congress in 1986, has become a key tool for business leaders across the nation.

Why Business Leaders use Private Insurance:

- **Manage Business Risks:** Protect against unforeseen challenges.
- **Protect Assets:** Safeguard valuable resources.
- **Participate in Underwriting Profits:** Benefit directly from remitted premium.



The eR3 Plan™ Competitive Advantages:

a) Minimal Capitalization Requirement:

Participants enjoy one of the lowest one-time capitalizations in the market—just a \$50,000 preferred stock investment in Alliance Reinsurance Company, Inc. (“ARC”), funded through their self-directed Roth IRA or Roth 401(k) plan.

b) Tax-Free Withdrawals at Age 59 ½:

Withdrawals from the Roth IRA or Roth401(k) plan are tax-free after age 59 ½.

c) Self-Directed Investments:

Once premiums become surplus within ARC, they are available to be invested by the Roth IRA/401(k) plan participant, through the plan custodian.

d) Strategic Domicile:

Alliance Reinsurance Company is domiciled with a Native American Nation, ensuring compliance through licensed third-party actuaries who review and validate associated risks.

e) No Trusts or Trustees:

Unlike other private insurance providers, our model does not use a trust, trustees, or a trust agreement. Instead, our clients' premium funds are held and invested in their individual Roth IRA/401(k) plan accounts.

IS IT POPULAR?

Yes! Forming a private insurance company allows businesses to:

- Create a dedicated asset base to mitigate risks.
- Fund losses and improve cash flow.
- Generate investment income.

DID YOU KNOW?

- **92% of Fortune 500 companies** use some form of private insurance.
- **According to IRS.gov**, private insurance companies are formed to supplement commercial insurance, allowing companies to retain money that would otherwise be spent on premiums.