Top business planning resources to know & use today

As summer nears, we are launching a series highlighting some of our most frequently used Advanced Markets resources — organized around your most common client conversations. This series will spotlight curated materials and tools designed to help support you and your clients in three areas: business planning, estate planning, and tax and legacy planning.

This month we are showcasing our resources that can help you guide business owners through key decisions — from protecting and transitioning their business to helping them retain and reward key employees.

Whether you are preparing for a meeting or following up with a client, these materials can help you bring clarity and structure to your conversations.

Client guides help explain the "why" behind key planning strategies in a clear, client-friendly way:

- Buy-sell arrangements
- Non-qualified benefit plan features at a glance
- Corporate split dollar

Because you asked provides answers to our frequently asked questions:

- Policy transfer from a business
- Top-hat plans
- Requirements for employer-owned life insurance

JH Solutions, our proprietary modules, support deeper planning conversations with structured, strategy-focused insights:

- Buy-sell planning: Cross endorsement
- Executive bonus plan
- Key person

Our Advanced Markets team can offer you support with case consultations, design insights and educational resources — including tools and calculators you can bring directly to your clients.

Additional resources **John Hancock SalesHub**

Post-tax season opportunities & strategic legacy planning

Tune in to Episode 60 of *Hancock Talks* to hear from Meg Patterson, a John Hancock Advanced Markets attorney, who discusses how to turn tax conversations into opportunities for broader wealth planning.

This episode provides practical guidance on:

- Reframing tax conversations
- Rethinking retirement assets
- Using life insurance as a tool for tax efficiency and legacy planning

Do not miss these actionable insights that can help strengthen planning conversations with your clients.

Listen now

Central Intelligence

Stay informed on important court rulings and legislative updates that can affect our industry. Each month, this publication summarizes topics that can directly impact your business. This issue includes:

- Terminated policy results in an income tax liability to taxpayer
- Senator Wyden introduces bill targeting private placement life insurance
- Texas court finds IRS exceeded authority in micro-captive insurance listed transaction designation
- IRS issues more regulations on H.R. 1 provisions

Read the latest

In case you missed it

Planning focus: Asset positioning and life insurance