

*“Principals dealing directly with Principals”*

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7/15/2020

Dear Steve,

*I want to thank Principals Direct Group for connecting our firm with your strategic partner Jordan Toder of Preservation Capital Partners.*

*The Zoom conference with our Trust & Estates attorneys clearly evidenced they have developed innovative and successful strategies that gave us some wonderful additional tools to assist with our client's estate planning.*

*Our T&E attorneys were thrilled to meet the team at PCP and learn about their creative and powerful structures.*

*Everyone that qualifies should be aware of and implementing the financial strategies they have created.*

*Clem*

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4/2019

Hi Steve,

I can't tell you how much I enjoyed learning about Ed's private placement life insurance program to preserve wealth.

I must've had 9 hours of meetings within depth questions about the plan and its technicalities, Ed sure knows his field. With the mushroom in value Fibertrap is going to have after I get these enormous distribution agreements signed, I need to get the ball rolling immediately putting my ownership interest into a policy before the appraisal recognizes this leap.

I can't tell you the regret I feel that my dad did not continue speaking with Ed and get into this program before his untimely passing. If he had done this, we literally would have saved *over a hundred million dollars* without question. Between the taxes, the low basis the real estate had due to all of the 1031 exchanges, and the thievery being had by those in control of the estate; these issues would have never existed if he had been enrolled in Ed's program.

One thing is for sure, I will not let the same happen to my children. My dad worked his whole life to take care of his family and to this day 3 and one half years since his death we've received nothing but legal bills. My children will not go through the agony my siblings and I have endured.

Chris Nelson, Chief Executive Officer

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**A landlord of multi-family properties with a net worth of over \$1Billion dollars,**

*“Thanks for taking the time to meet with me and my executive team. While I consider myself very well versed in commonplace estate planning mechanisms, it was intriguing to learn about the insurance policy mechanism you discussed. I will review the soft copy documentation with our estate attorney and circle back with feedback, to see what next steps could be for us to move forward”*

