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This clearly written guide provides information essential to the exercise of due care for the purchase and retention of life insurance policies. Major life insurance terms are clearly explained, and information is organized starting with the insurance purchase and assessing a company's financial strength.The Advisor's Guide to Life Insurance is designed to assist advisors in making better informed life insurance recommendations to their clients, and it also serves as an expert training tool for advisors and their staffs. This clearly written book provides information essential to the exercise of due care in the purchase and retention of life insurance policies.The Life Insurance Policy Crisis: The Advisors and Trustees Guide to Managing Risks and Avoiding a Client Crisis [E. Randolph Whitelaw, Henry Montag] on Amazon.com. *FREE* shipping on qualifying offers. For many years, life insurance was considered one of the most ethical and stable financial services businesses. ButThe Advisor's Guide to Life Insurance Taxation. The Advisor's Guide to Life Insurance Taxation provides a quick reference to answer common client questions and identifies more complex areas where the PPI Planning Servies team may be required.