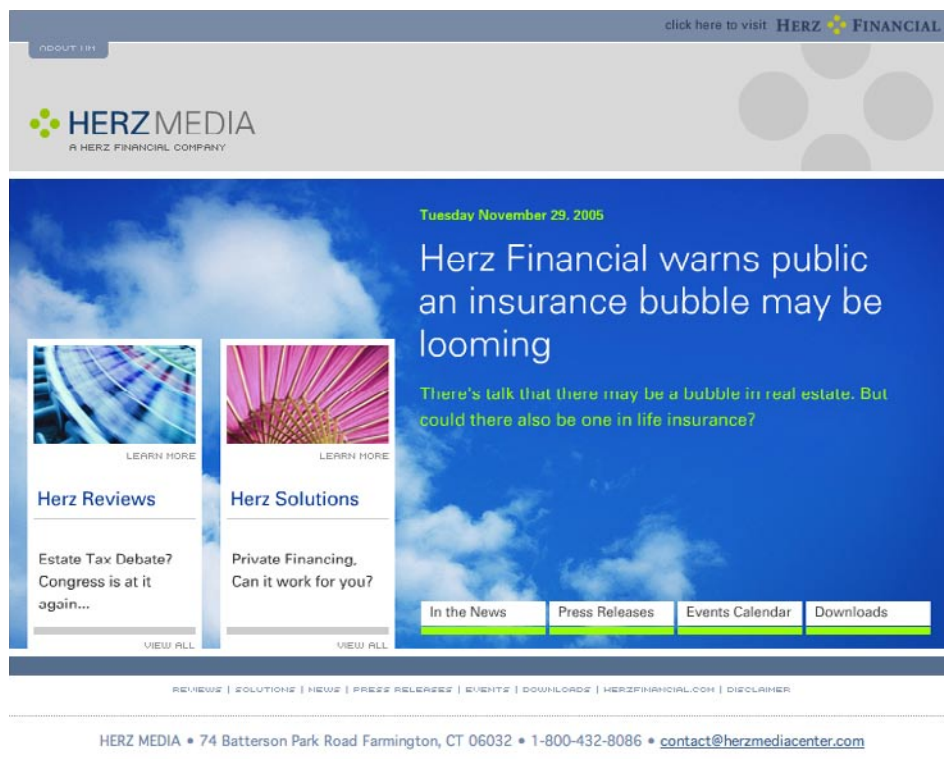


## WEBSITE LAUNCH

# HERZ MEDIA

[HERZFINANCIAL.COM/MEDIA](http://HERZFINANCIAL.COM/MEDIA)



### THE CHALLENGE:

After completing work on a compelling new corporate website for Herz Financial, our client approached us to take their online representation one step further, deliver even more value to their clients, the industry at large and the media.

Herz wanted to provide expanded insight into the company mindset, create a community forum for the financial industry, access to a professional knowledge base for the media and reinforce the firm's position in the public eye as respected market leaders.

### THE SOLUTION:

Frank was commissioned to develop Herz Media, a complementary portal site for Herz Financial that would connect the community, serve as an ongoing resource centre for the media and industry experts, and provide in depth market and product insight for clients and prospects.

For more info see next page...

# FRANK

## IDEAS AND EXECUTION

**HERZ MEDIA**  
A leading financial planning resource

Herz Reviews | Herz Solutions | In The News | Press Releases | Events Calendar | Downloads

**Herz Reviews** June 7, 2010 Mix Reviews

**Congress is at it again...**

By Randy S. Herz

**ISSUE: Death & Taxes, The Estate Tax.**

**Is it really going away?**

**The story:** Like many of you, I have recently heard all kinds of reports about the estate tax going away. The House did in fact approve a permanent repeal of the estate tax, and now the ball is in the Senate's court to decide. The repeal, however, went through with only a minimal discussion of the implications and details. It seems like the real work has been dumped in the Senate's lap.

As usual, members of Congress are all over the news debating this as a financial issue, a tax issue, and believe it or not as a moral issue. Is taxing death fair? Yes it is. Just like taxing anything else is fair. Taxes are fair and taxes are fun. Good times.

I was watching CNBC the other night and a Congressman from some state near neverland was being interviewed about this subject and actually said, "he's dying bad enough as it", isn't dying bad enough as it? Well, yes Mr. Congressman, dying does kind of run your day. Thanks for pointing that out.

**Reviewed by:**

**Randy S. Herz**  
Senior Vice President  
Herz Financial

During my recent trip to Paris I had the opportunity to read two great books, *The Toppling Point* by Malcolm Gladwell and *Money* by Jack Welch. I strongly recommend both of these to you.

### Herz Reviews

- Gives top financial and legal professionals a platform to express their opinions on the latest news stories.

**HERZ MEDIA**  
A leading financial planning resource

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**Herz Solutions** June 15, 2010 Mix Solutions

**Herz Private Financing**

**WHAT IS PRIVATELY FINANCED LIFE INSURANCE?**

Privately financed life insurance, also known as self-financing, is a loan between you and an Irrevocable Life Insurance Trust (ILIT) or between an existing entity of yours such as a business, ILIT or family limited partnership (FLP) and an ILIT.

**HOW DOES IT WORK?**

Private Financing is a simple transaction in which you, your business, a family limited partnership (FLP), or another entity loans money to your Irrevocable Life Insurance Trust (ILIT) at the applicable federal rate (AFR) to purchase a life insurance policy on your life.

**Created by:**

**Matthew Herz**  
Senior Vice President  
Herz Financial

"The trustee for the ILIT utilizes this money to make investments that will generate sufficient income to allow the ILIT to make annual premium payments..."

**Diagram:** A circular diagram showing the flow of funds between three entities: 'Family Member or Entity', 'ILIT', and 'Insurance Company'. Arrows indicate 'Premium Loans' from the Family Member to the ILIT, 'Premium Payments' from the ILIT to the Insurance Company, and 'Death Benefit' from the Insurance Company to the Family Member.

### Herz Solutions

- Provides a simple explanation of Herz's products, how they work and who should consider using them.

**HERZ MEDIA**  
A leading financial planning resource

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**Herz in the News** 1 | 2 | 3 | 4 | 5

**Financial-Planning.com** April 6, 2010 January 10, 2010

**2010: The Technology You'll Live**

A future of aggregated accounts, wireless communications, and instant messaging with clients.

**USA TODAY** **These people do make house calls and business is good**

As time becomes an increasingly precious commodity, a number of businesses are going mobile — taking their services on the road to make house calls.

**January 14, 2010** **December 5, 2014** **November 9, 2014** **October 12, 2014**

**abc NEWS** **Small Businesses Are Hiring in 2010**

The growing economy has helped some small business owners decide that it's time to start hiring again or, in the case of new companies, hiring for the first time.

**Rep.** **I've Got Your Back**

"These days, firms all over, from the largest winhouses to tiny independents, have gotten the team religion."

**WALL STREET JOURNAL** **Faculty Fit**

It's tough to get people worried up about taxes or insurance. Sure, I could rattle you with visions of your family broke and starving after your sudden, unexpected demise, or unnerve you with the prospect of an encroaching run-in with the IRS. But I

**Chicago Tribune** **Considering Special Needs**

If you have a son, daughter, spouse or other relative with a disability or other special needs, the planning process demands more specialized legal documents.

### In the News

- An archive of news articles from major media outlets which contain commentary from the Herz executive.

**HERZ MEDIA**  
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**Herz Downloads**

**Writing an article?**

**Marketing Materials**

File Name	Type
Herz Financial Corporate Logo (vector)	[PDF]
Herz Financial Corporate Logo (detailed)	[PDF]
Herz Media Corporate Logo (vector)	[PDF]
Herz Media Corporate Logo (detailed)	[PDF]
Headshots - Roman Herz	[PDF]
Headshots - Matthew Herz	[PDF]
Headshots - Randy Herz	[PDF]
Corporate Biography - Roman Herz	[PDF]
Corporate Biography - Matthew Herz	[PDF]
Corporate Biography - Randy Herz	[PDF]
Herz Financial Timeline	[PDF]
Herz Media Disclaimer	[PDF]
Herz Privacy Policy	[PDF]

HERZ MEDIA • 74 Sartorius Park Road Farmington, CT 06032 • 1-800-413-8196 • [contact@herzmedia.com](mailto:contact@herzmedia.com)

### Downloads

- Quick and easy access to Herz marketing materials.

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A leading financial planning resource

**Administration Backend : News** [1] [2] [3] [4] [5]

**DATE:** [Jan 10] [11 10] [2005 10]

**TITLE:** [ ]

**INTRO:** [ ]

**AUTHOR:** [ ]

**CONTENT:** [ ]

**QUOTE:** [ ]

### CMS

- Allows Herz to quickly and efficiently manage and publish site content with internal resources.

Our team designed and delivered a slick online media package and community building mechanism that connects those in need with those in the know.

**Let's explore the possibilities.**

**FRANK - 416 596 8545**  
**[CONTACT@JUSTBEFRANK.COM](mailto:CONTACT@JUSTBEFRANK.COM)**