

Global Private Placement Life Insurance (PPLI) Market Size Report, Forecast to 2031 – COVID-19 Impact Analysis

Global Private Placement Life Insurance (PPLI) Market Insights, Growth, Size, Comparative Analysis, Trends and Forecast, 2023 – 2031

HOUSTON, TEXAS, UNITED STATES, July 14, 2023 /EINPresswire.com/ -- Private placement life insurance (PPLI) is a niche solution designed for wealthy individuals in high tax brackets who have a few million dollars to invest. It is a form of “permanent” variable universal life (or VUL) insurance providing both death benefit protection and a cash value

component that accumulates over time. The private placement life insurance (PPLI) market has grown significantly in recent years due to its ability to provide investors with access to alternative investments such as hedge funds, private equity, real estate, and commodities within a single policy. This allows investors to diversify their portfolios while taking advantage of the tax benefits associated with life insurance products. Additionally, PPLI policies can be used as an effective tool for wealth transfer strategies by allowing investors to pass on assets without incurring estate taxes or capital gains taxes.



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PPLI accounts invest in insurance dedicated funds that grow on a tax-free basis and are paid out income tax-free upon death of the insured individual. These accounts offer the potential for higher returns than traditional investments due to their ability to access alternative investments not available through other vehicles. However, they also come with higher fees and require significant upfront capital investment which may be prohibitive for some investors. In order for PPLI policies to qualify as life insurance products under IRS regulations, there are two key requirements that must be met: first, the policy must be maintained with a minimum amount of

mortality risk (death benefit); second, the policy must contain an investment portfolio component managed by an independent third-party advisor. Additionally, these policies are only available to qualified purchasers and accredited investors due to their complexity and lack of liquidity compared to more traditional investments.

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Global Private Placement Life Insurance (PPLI) Market: Contract Type Insights

There are two types of contracts available when it comes to PPLI: Modified Endowment Contracts (MECs) and Non-Modified individual Endowment Contracts (Non-MECs).

A Modified Endowment Contract (MEC) is an insurance policy that is funded with more money than the internal revenue service permits for tax-free withdrawals. This type of contract offers the policyholder the ability to access funds without paying taxes, but there are certain restrictions in place. For example, any withdrawals made within the first 15 years of the policy will be subject to taxes and penalties. This segment accounts for the highest market share in 2022 accounting for ~52.39% over the forecast period (2023 – 2031).

Non-Modified individual Endowment Contracts (Non-MECs) are policies that have been funded with less money than what is allowed by the IRS for tax-free withdrawals. This type of contract offers more flexibility when it comes to accessing funds as there are no restrictions or penalties associated with early withdrawals. However, any withdrawals made from this type of policy will be subject to income taxes.

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Global Private Placement Life Insurance (PPLI) Market Share By Type (2022)

Key Takeaways: Global Private Placement Life Insurance (PPLI) Market

- The Europe private placement life insurance market was valued at US\$33.69 Mn in 2022. Based on country, Germany accounted for the highest market share amongst European countries for the PPLI market.
- Based on type, the hedge funds segment in the private placement life insurance market had the highest share in 2022, as hedge funds are widely being considered for its notable benefits of investment strategies that can generate positive returns.
- Based on the users segment, high net worth individuals segment is anticipated to be the fastest growing segment over the forecast period, owing to the tax benefits associated with the insurance product. Due to the rise in income amongst a huge population it is anticipated that private placement life insurance market will experience an upsurge in the upcoming years.
- Some of the major players operating in the global private placement life insurance (PPLI) market are ADVANTAGE INSURANCE INC., Axia Global, Cohn Financial Group LLC, COPPERSTONE INSURANCE SERVICES LLC, Creatrust, Crown Global Insurance Group LLC, Evergreen, Financial Designs Ltd., Geneva Management Group, Informa USA Inc., Insurance and Estate Strategies LLC, My National Family Office Inc., Sage Capital Advisors, SFS Global Corp., TOWER STRATEGIC

GROUP LLC, Winged Keel Group, and Wisdom Capital, amongst others.

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Global Private Placement Life Insurance (PPLI) Market:

By Type

- o Hedge Funds
- o Managed Accounts
- o Private Equity
- o Derivatives
- o Venture Capital
- o Commodity Funds
- o Real Estate Investment Funds

By Subscription process

- o Streamlined subscription process
- o Customized subscription process

By Contract type

- o Modified Endowment Contract (MEC)
- o Non-Modified individual Endowment Contract (Non-MEC)

By Users

- o Family offices
- o High-net-Worth Individuals
- o Others

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By Region

- o North America (U.S., Canada, Mexico, Rest of North America)
- o Europe (France, The UK, Spain, Germany, Italy, Nordic Countries (Denmark, Finland, Iceland, Sweden, Norway), Benelux Union (Belgium, The Netherlands, Luxembourg), Rest of Europe)
- o Asia Pacific (China, Japan, India, New Zealand, Australia, South Korea, Southeast Asia (Indonesia, Thailand, Malaysia, Singapore, Rest of Southeast Asia), Rest of Asia Pacific)
- o Middle East & Africa (Saudi Arabia, UAE, Egypt, Kuwait, South Africa, Rest of Middle East & Africa)
- o Latin America (Brazil, Argentina, Rest of Latin America)

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