

Creating Leverage & Flexibility in Estate Planning

Client Profile:

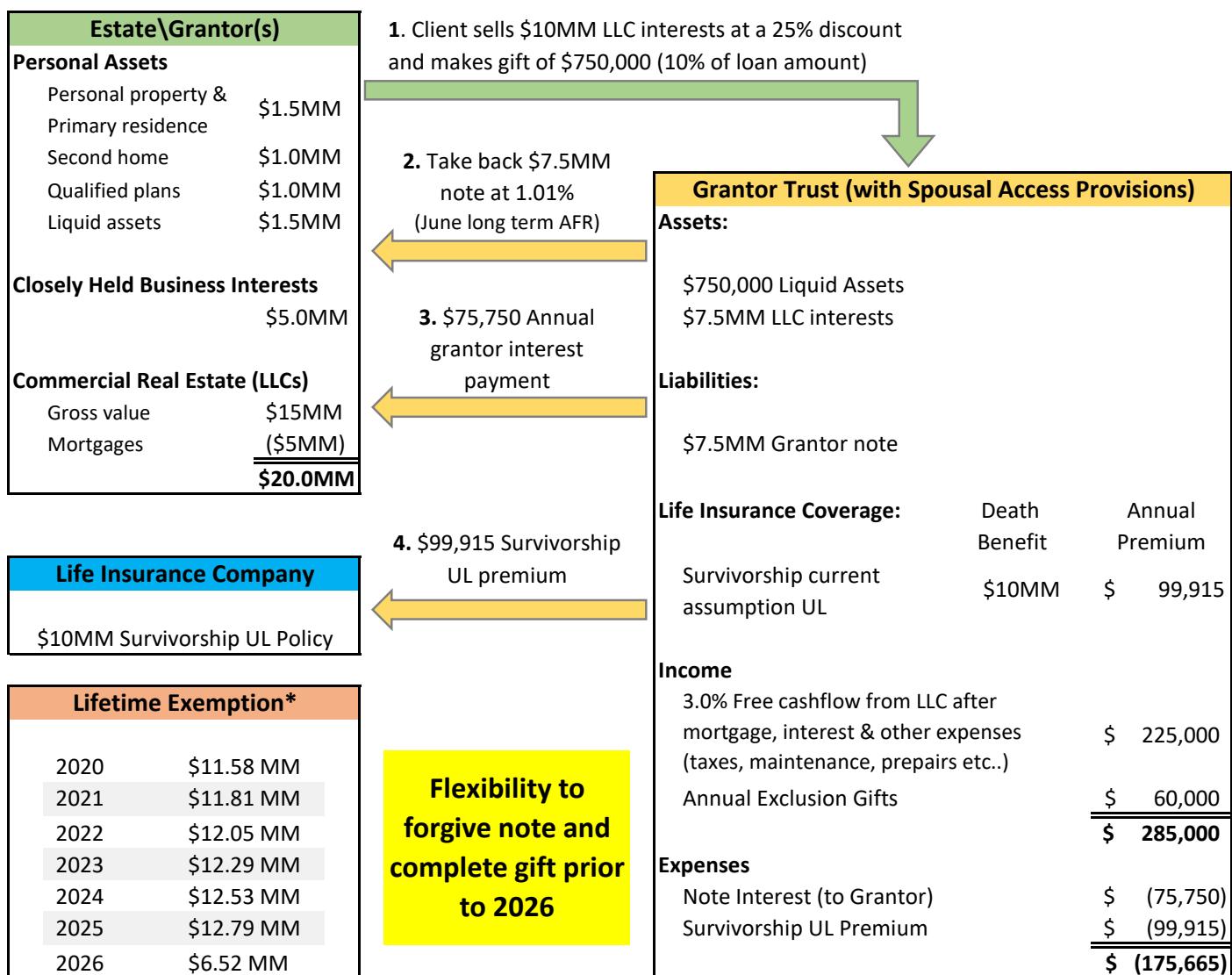
Married couple (ages 65 & 60) with 2 children

Financial Profile:

Net worth of approximately \$20MM, comprised mostly of Investment Real Estate LLCs & closely held business

Goals:

- 1 Fund irrevocable trust while minimizing gift tax exposure and maximizing use of estate tax exemption
- 2 Create additional cashflow inside the trust to address other needs



*Assuming 2% annual adjustment

Excess Cash Flow Generated in Trust \$ 109,335