



Provide for your Family - Pass on your Wealth - Impact your Community

Request our FREE Booklet: *The Generational Transfer Trust*

Does your estate plan **protect your family's future?**

Like most, you probably have a Will and/or a Living Trust in place. Does it transfer a large amount of assets to your family at one time? **You can stretch part or all of your gift to them over their lifetimes and help protect and provide for their futures.** Plus you can receive lifetime income for yourself and a significant tax deduction NOW and then the lifetime income would go to your family after your lifetime!

Our **FREE** booklet: ***The Generational Transfer Trust*** contains information to help you transfer your assets to the next generation with a plan that accomplishes all your goals and objectives while providing for your favorite charities at the end to help make your community a better place!

COMPARISON ILLUSTRATION

Donors (74 & 74)
Two Children (Current Ages 55 & 50)
and Three Grandchildren

Features	GENERATIONAL TRANSFER TRUST (Current) Four-Lives (Husband, Wife & Two Children)	GENERATIONAL TRANSFER TRUST (Testamentary) Two-Lives (Children) Plus 20 Years (Grandchildren)
Funding Value	\$200,000	\$200,000
Payout Rate or Current CD Interest	5.00%	5.00%
Ages of Beneficiaries	74, 74, 55, 50 years	76 and 71 years*
Estimated Years of Payout to Family	46 years	43 years
Beginning Payout per year	\$10,000	\$10,000
Projected Payout At Maturity of Trust**	\$20,000	\$20,000
Charitable Income Tax Deduction	\$40,000	\$58,000
Total Income to Family over Lifetimes	\$625,000	\$620,000

* Future assumed ages used for children based on life expectancy of the donor

** Income may vary annually and provides a hedge against inflation as the assets grow tax-free within the Trust

EMAIL:

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DOING THE MOST GOOD®