

PHILANTHROPY:

WILL YOURS BE

VOLUNTARY

OR

INVOLUNTARY?

PHILANTHROPY: Voluntary or Involuntary



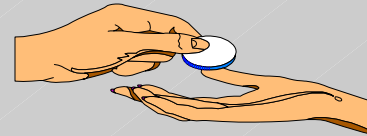
ZERO TAX
10% TAX
20% TAX
30% TAX
40% TAX
50% TAX
60% TAX
70% TAX
80% TAX
90% TAX
100% TAX



**A/B
Trust**



**Wealth
Replacement
Dynasty Trust**



**Annuitization,
Charitable
Gifts & Trusts**



**Family
Foundation/
Partnerships**

10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



Percentage of Assets Passed to Next Generation



PHILANTHROPY: Voluntary or Involuntary Zero Estate Tax Planning

While popular, this is the
“Kindergarten” of Estate
Planning, eliminating only 20%
of potential taxes.



ZERO TAX

10% TAX

20% TAX

30% TAX

40% TAX

50% TAX

60% TAX

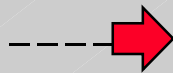
70% TAX

80% TAX

90% TAX

100% TAX

10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



A/B
Trust



Percentage of Assets Passed to Next Generation

PHILANTHROPY: Voluntary or Involuntary

Zero Estate Tax Planning

ZERO TAX

10% TAX

20% TAX

30% TAX

40% TAX

50% TAX

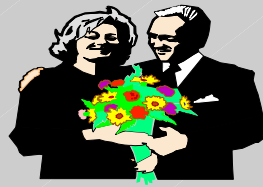
60% TAX

70% TAX

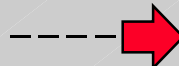
80% TAX

90% TAX

100% TAX

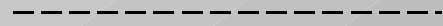


&



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PHILANTHROPY: Voluntary or Involuntary

Zero Estate Tax Planning

**Adding the Wealth Replacement
Dynasty Trust has helped, but
Uncle Sam still has a “lien” on
80% of what you own!!**

ZERO TAX

10% TAX

20% TAX

30% TAX

40% TAX

50% TAX

60% TAX

70% TAX

80% TAX

90% TAX

100% TAX



&



A/B
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10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

Percentage of Assets Passed to Next Generation