

THE PERIODIC TABLE OF ESTATE PLANNING ELEMENTS

We use this table to help in discussions with you and the planning team as to which tools should be considered from among the wide universe of available strategies and programs.

Charitable Remainder Unitrust	Gift Annuity	Note To Charity	Rent To Own	GRAT	ILIT	QPRTs
TCLAT	FLIP CRUT	Split Dollar	Life Settlements	Sale for Installment Note	Family Limited Partnership	Private Annuity
Charitable Life Estate	NIMCRUT	C Corp LTC	Family Bank	Gifting	Asset Protection	Family LLC
Private Foundation	LLC/CRT	Art & Collectible Planning	Crummey Powers	Annuity Maximization	Captive Insurance Planning	529 Plans
Donor Advised Fund	Frozen CLAT	Revocable Trusts	Jurisdictional Trusts	Dynasty Trust	Intra-Family Loans	IRA Maximizer
Supporting Organizations	Shark Fin CLAT	Preferred LPs and LLC	Succession Planning	Premium Finance	Corporate Recapitalization	ESOP Planning
Bargain Sales	Operating Foundation	Life Insurance	Buy-Sell Agreements	GDOT	SCIN	412(e)

Charitable Planning ■ Personal Planning ■ Qualified Planning ■