

InKnowVision Process



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JUNE 1ST – CASE STUDY WEBCAST

JUNE 15TH – TECHNICAL “GDOTS”

JUNE 22ND – MARKETING/PROCESS WEBINAR

InKnowVision Background



- **Consultant to**
 - Attorneys
 - CPAs
 - Financial Advisors
- **600+ collaborations**
 - Net worth range-\$10M-\$500M

Collaboration



- **Inclusive**
- **Respectful**
- **Capitalize on the strengths of client's advisors**

Process



DISCOVERY

DESIGN

IMPLEMENT

MAINTAIN

Fact Finding

Goal Setting

Goal Prioritization

Current Balance Sheet

Current Cash Flow

Periodic Table

New Balance Sheet

New Cash Flow

Efficiency/Simplicity

Legal

Financial

Insurance

Ownership

Compliance

Changes in law

Changes in goals

**Changes in personal
situation**

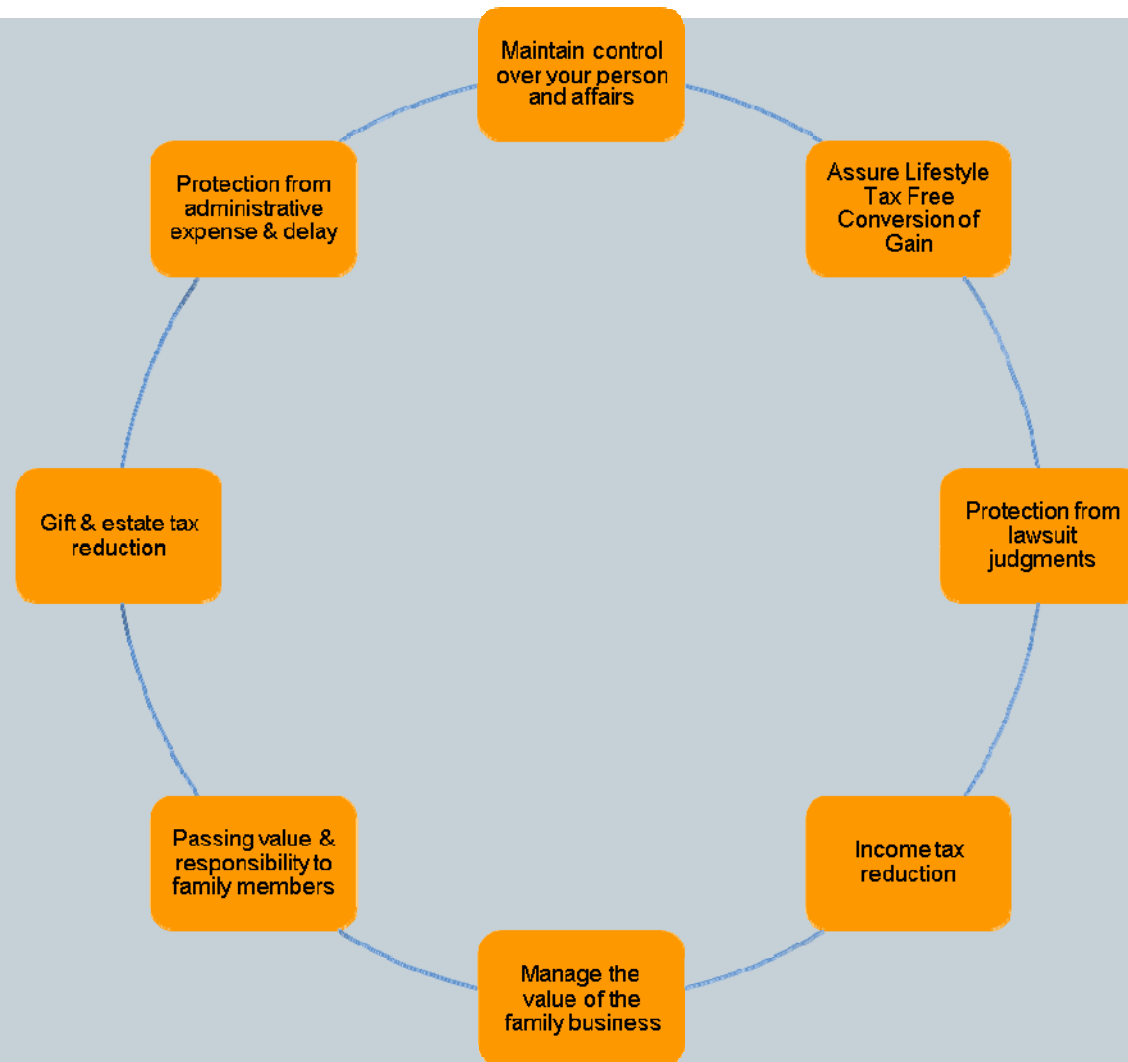
Compliance

Next Steps - Discovery



- Data Gathering
- Document gathering
- Balance Sheet and Cash Flow Analysis
- Goal Setting / Goal Priority Meeting

Goals and Priorities



Plan Development



Our goal

- **Deliver, implement and maintain a plan that**
 - Allows you to reach your goals
 - Has the approval and endorsement of your team
 - In the simplest most efficient way possible

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 ■

Plan Presentation



- Designed to show you what you want and need to know
- Back up provided for advisor team members
- [Sample Plans](#)
- Order printed and bound color copies customized with your firm name - \$97.00

Fee Schedule



- [Available Online](#)
- **Plans - \$18,000**
- **Add on / double/ leave alone**
- **Small case – smaller fees, depends on facts and availability**

Implementation

Action Step	Responsible Party	Date Completed
Documents to Be Drafted and Executed		
Restatement of RLTs as necessary		
Oversee transfer of Guarantees on 15% of \$15M on Company Debt		
Minute Book Review -		
Minute Book Review -		
Communicate to Franchisors as directed under Franchisee agreements - letter of explanation, etc...		
Sale of business 1 (S Corp)		
Purchase and sale agreement		
Security Agreement		
Promissory Note		
UCC-1 Form		
Corporate Recapitalization (Business 2)		
Stock Surrender, Recapitalization & Reconstitution		
Security Agreement		
Prepare or amend Shareholders' Agreement		
Grantor Deemed Owned Trust (husband)		
Grantor Deemed Owned Trust (Wife)		

Maintain



- **Critical Step**
- **Provides least number of surprises**
- **Best outcomes**
- **More opportunities**

Next Steps



- **It all starts with a call**
 - 630-596-5090
- **Review our web site**
 - www.inknowvision.com