

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 Uni-Trust	Charitable Remainder Annuity Trust	LLC/CRTs	Rent To Own	Grantor Retained Annuity Trust	ILIT	Offshore Captive Planning
TCLAT	Gift Annuity	Frozen TCLAT	Life Settlements	Sale for Installment Note	Family LP and LLC	QPRTs
Charitable Life Estate	NIMCRUT	Long Term Care Insurance	Pet Trusts	Gifting	Asset Protection	Leveraged Roth Conversion
Private Foundations	FLIPCRUT	Art and Collectibles Planning	Family Bank	Annuity Withdrawal	Intra Family Loans	ESOP Planning
Family Charity Plan	CLUT	Revocable Living Trusts, DPAs	Crummey Powers	Dynasty Trust	Corporate Recapitalization	412(i)
Supporting Organizations	CLAT	Preferred LPs	Jurisdictional Trusts	Premium Finance	SCIN	IRA Maximizer
Bargain Sales	Donor Advised Funds	Life Insurance	Succession Planning	Buy-Sell Agreements	GDOT	Qualified Plan Limited Partnership

■ Charitable Planning Tools

■ Personal Planning Tools

■ Qualified Planning Tools