

**Capitalized Entity Sale to
an Intentionally Defective
Grantor Trust with
Leveraged Life Insurance
Protection owned by and
controlled for the
Next Generation**

Approved for continuing legal education (CLE) in WA state, and California

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Immediate Living Benefits

PROBLEM:

- Family assets are subject to estate taxes at the death of Mom & Dad...
- Mom & Dad are living off the earnings of their assets...
- Dad is reticent to relinquish control of his assets...
- Mom & Dad aren't interested in changing the nature of their assets and portfolio...

What if there was a way to move your existing assets into a protected place, forever beyond exposure to estate transfer taxes?

WITHOUT:

- Giving up control,
- Reducing your current income,
- Or changing the nature of the assets themselves?

**Well, there is a way ... and the attorneys you work with use it every day.
May I show you how it's done?**

BOTTOM LINE:

- IRS gets nothing
- Kids get everything
- Family Wealth is held in the protection of an IDGT

And the Law Firm gets to:

- Create an IDGT
- Create an FLP
- Create an installment note
- Arrange for a life insurance policy
- Memorialize the structure of the will(s)

