

# 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 Trust	Preferred PIF™	Young PIF	Rent To Own	Grantor Retained Annuity Trust	ILIT	Split funded Insurance
TCLAT	Gift Annuity	Family Limited Partnership	Life Settlements	Sale for Installment Note	Intentional Non-Grantor Trusts	QPRTs
Charitable Life Estate	NIMCRUT	S Corp/C Corp optimization	SLATs	Gifting	Asset Protection	Pension Optimization Plan
Private Foundations	FLIPCRUT	Walton GRAT	Family LLC	Annuity Withdrawal	Intra Family Loans	ESOP Planning
LEGA-C PLAN™	Balloon CLAT	Revocable Living Trusts, DPAs	Captive Substitutes	Dynasty Trust	Corporate Recapitalization	Pension Rescue
IGNIT Plan™	CLAT	Preferred LPs	Jurisdictional Trusts	Premium Funding	SCIN	Defined Benefit Plans
Bargain Sales	Donor Advised Funds	Life Insurance	Succession Planning	Buy-Sell Agreements	GDOT	Profit Sharing Plans

■ Charitable Planning Tools

■ Personal Planning Tools

■ Qualified Planning Tools

