

List of Strategies

| Family Wealth Transfer | Income Tax Savings | Retirement Accumulation | Executive Benefits | Business Transition | Wealth Management | Charitable Planning | Asset Protection | Insurance |
|---|-------------------------------|-----------------------------------|------------------------------|---------------------|------------------------|--|---------------------------------|--|
| Grantor Retained Annuity Trust | Captive Insurance Company | Roth IRA Conversion | 162 Bonus Plan | Key Man Insurance | Annuity Arbitrage | Charitable Remainder Unitrust | Domestic Asset Protection Trust | Policy Review |
| Sale of LPI to GDOT | Grantor Charitable Lead Trust | 410(k) | Profits Interest | Recapitalization | Asset Allocation | Charitable Limited Partnership | Offshore Planning | Transfer of Existing Policy to Grantor Trust |
| Qualified Personal Residence Trust | | New Comparability Plan | Deferred Compensation | Buy-Sell Agreement | Costless Collar | Charitable Lead Annuity Trust | Jurisdiction Planning | Generational Split Dollar |
| Dynasty Trust | | Variable Universal Life Insurance | Secular Trust | Buy-Sell Funding | Exchange Traded Funds | Testamentary Charitable Lead Annuity Trust | Entity Planning | Life Settlement |
| Intentionally Defective Trust | | Deferred Variable Annuity | Phantom Stock Plan | | Hedge Funds | Charitable Limited Partnership | Liability Insurance | Premium Financing |
| Family Limited Partnership or LLC | | Pension Rescue | Charitable Compensation Plan | | Managed Accounts | Private Foundation | | |
| Low Interest Interfamily Loan | | | Split Dollar | | Option Income Strategy | Donor Advised Fund | | |
| Private Annuity or Self-Cancelling Installment Note | | | | | Indexing | Gift Subject to Life Estate | | |
| | | | | | | Charitable will bequest | | |