YOUR PERSONAL FINANCIAL WEBSITE

Leaving a Legacy

THE DISTRIBUTION CENTER

See a personalized story of your estate with the Distribution Center.

Go back to Plans	ER								
Selected Plan Base Facts ▼		Selected Report Estate Flow Charts ▼					Simulation Year As of Today ▼		
TECHNIQUES	Modify	Net Worth	Frank's Death	Survivor Income	Joanna's Death	ı	Overview	,	
Gift to Charity							View in Pres	ent Valu	ie Ø
Retire 3 Years Later - Age 68/67		IN ESTATE					OUT	OF EST	ATE
Increase Charitable Giving		Joanna's Net Worth \$1,558,251		Frank's Estate \$2,664,505	Heirs			\$169,6	06
Create CST				Ļ					
Reduce Soc Sec by 33%			Taxes & Expen	ses	(\$50,000)				
Create ILIT			Heirs & Trusts		\$0				
Tax Rates	~		Inheritance		\$2,614,505				
AMT	~			÷					
() Marginal			Joanna's Estate \$4,672,757						
0	All On • All Off			Į					
	ALC: NO		Taxes & Expen	ses	(\$896,351)				
ADVANCED TECHNIQUES	Advanced		Heirs & Trusts		\$3,776,406				

REVIEW OPTIONS TOGETHER

We'll assess the risks and benefits of estate planning scenarios and work with you to better protect your legacy.

SEE PROJECTIONS IN REAL-TIME

Make live adjustments to your estate plan to project the possible impact of your financial decisions.

VISUALIZE YOUR ESTATE PLAN

See the effects of multiple estate planning techniques, like trusts or charitable giving.

With the interactive Distribution Center, you can be sure you're taking care of the people and organizations that matter most.