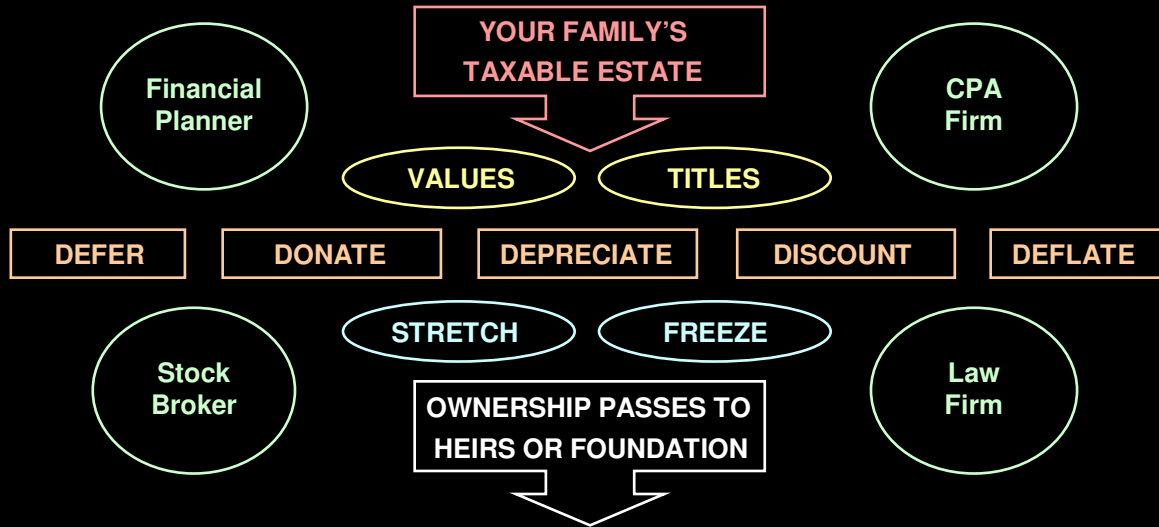




Wealth Preservation Institute, LLC

Estate Plan Review



Estate Review was designed with family wealth preservation in mind.

We can often reduce or eliminate state inheritance, federal estate taxes, capital gains, (and many other transfer and excise taxes), from your family's financial future. We achieve this with our proprietary **Estate Review** process. Deferral, donation, depreciation, deflation, and discounting all play an important role in how assets are eventually valued by the US government. With assets that must remain under the control of an estate owner (like qualified plans or business entities), we can stretch-out distributions or freeze values --and still remain compliant with all I.R.S. guidelines.

With the myriad possibilities for successful estate transfers, planning truly becomes an art form. With the help of accounting, legal, and banking professionals, we design and test each solution for both practicality and tax efficiency. We use highly detailed economic models of your current planning options, and compare those models to best-of-class solutions used by America's wealthiest families (*Wal-Mart, Forbes, etc.*).

CASE STUDY: *Business owner sells his three children his factory, land, accounts, and stock without discounting values using either a family limited partnership interest or a management agreement. The owner dies within 6 years. The remaining note is still owned by the estate and is taxable. The business fails within 24 months due to avoidable tax and debts.*

- Review Candidates:**
- Business owner (*pre-sale or transfer*) Verify _____
 - Qualified pension plans (*over-funded*) Verify _____
 - Wealthy widows (*without estate plans*) Verify _____
 - Recent retirees (*with \$3M+ net worth*) Verify _____
 - Real estate assets (*an illiquid estate*) Verify _____
 - Executive Staff (*without key man life*) Verify _____
- It costs advisors nothing to provide their best clients with estate tax reviews --which creates malpractice protection for advisors and their professional firms.*

For more detailed information on select WPI, LLC Financial Reviews® please refer to our individual offerings and white papers.