

Time to Wake the Sleeping Giant!

The Charitable Lead Trust

Come discover the underutilized financial power and other rich benefits for donors, charity and professional advisors.

- The Lead Trust is no longer just for the ultra wealthy, but for gifts of \$250,000 and above.
- In a lively, interactive case study format, explore how the Charitable Lead Trusts can be used in:
 - Financial Planning During Lifetime (business and tax, windfalls and income spikes, income shifting, start-up companies).
 - Gift and Estate Planning (zeroed out tax on wealth transfer, wealth shifting, land and business).
 - Fundraising (pledges, capital campaigns, “temporary endowments”).
- Touch on advanced strategies (leveraged CLAT, layered CLT, “shark fin” CLT, combo and tandem trusts, turbo-partnership/CLT, and tools for shaping the income corpus over the life of the trust).
- 7 often overlooked and undiscovered opportunities when the Charitable Lead Trust is the “best fit” for the situation.
- The technical information will be embedded within the case studies and in the handout materials for even the heartiest of appetites. However, our aim is to review the benefits and applications of lead trusts in order to actually do more lead trusts.

As a result of this sixty-minute workshop, you will:

- 1) Be able to explain a Lead Trust in 30 seconds;
- 2) Identify at least 7 great fit scenarios;
- 3) Use your one-page cheat sheet (provided) for intelligent talking points;
- 4) Pocket some fresh, vivid and concrete ways to compellingly convey its beauty and power.

Guaranteed you’ll be glad you came or Greg will buy you lunch!

Greg Bodine is the Senior Gift and Estate Planner for The Salvation Army; he has been on staff for the past 22 years. He is a Charter Member of The Heritage Institute and an all-around good guy.