

WHEN TO CONSIDER LEGACYTREE FOUNDATION?

- **When your client is tax-sensitive (could benefit from a tax deduction)**
- **When the client owns an annuity they plan to pass to heirs, rather than use for income (goal is to minimize taxable 1099 gains that the heirs would inherit)**
- **When clients would like to exit from appreciated securities or real estate and minimize capital gains taxes**
- **The client has qualified (IRA) assets and would like to: 1) convert them to a Roth IRA OR 2) take distributions - in a tax-free or tax advantaged manner**
- **When the client would like to structure income for themselves or their children and benefit their favorite charity NOW... (goal being to create immediate income and/or use income to fund a life insurance plan to benefit heirs more tax efficiently)**
- **Your client is doing estate planning and wants charities to benefit as well as their family when they pass away**

We are ALWAYS willing and available to discuss possible case design & suitability, even if you're not sure if we are a fit.

CALL US! 615-468-8048

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LegacyTree
F o u n d a t i o n

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