Client
Needs Analysis

Checklist

Simplified Planned Giving will work for my clients because I have:

- ☐ Clients who would like to reduce the value of their taxable estate, and restore the **full value**, **tax-free**, to their heirs.
- ☐ Clients who would like to utilize the money in their **IRA's** on a **tax-advantaged** basis.
- ☐ Clients that want to be protected from the **Medicaid spend-down** requirements.
- ☐ Clients that own **closely-held businesses** and do not wish to pay the **Capital Gains or Income Tax** on the sale of the business.
- ☐ Clients who want to increase the **income from stocks or real estate** while reducing Capital Gains Taxes.
- ☐ Clients that are concerned about **pending Income Tax due** on the growth of their **Deferred Annuities** and would like to reduce or eliminate it.
- ☐ Clients that are highly compensated and want to put more **tax-advantaged dollars** away for **retirement** than their qualified plan allows.
- ☐ Clients that could benefit from a large **Income Tax Deduction**.
- ☐ Clients who would like to increase their income on a **guaranteed** basis.
- ☐ Clients who could benefit from a combination of these **"Living Benefits".**

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