Data Entry Worksheet - Living Lead Trust (51)

Advisor Name: _____ **Firm:** _____

Street Address: _____ **City:** _____ **State:** _____ **ZIP:** _____

Phone: _____ **Fax:** _____ **Email:** _____

Donor(s) Name(s): _____

Gift Date: ____/____/_____
(Date of trust funding)

Trust Payout: Annuity Trust
                                 Unitrust

Trust Type: Family Lead Trust
(Remainder Recipient)   Grantor Lead Trust
                                 Lead Supertrust

Term of Years: _____
(Trust duration. 1-20 years. Partial years are allowed as well.)

EZ Lead Trust Option:

   No EZ Lead Trust (standard term of years lead trust)
   Lesser of One Life or Term of Years
   Lesser of Two Lives or Term of Years

Name and birth date of term of years' beneficiaries?

1. _____ DOB___/___/___
2. _____ DOB___/___/___

Income tax bracket of donor(s)?
   37%   35%   32%   24%   22%
   12%   10%   Other_____

Capital gains rate of donor(s)?
   23.8%   18.8%   15%   Other_____

Gift Tax Rate: _____%
(If donors can use gift or lifetime exemptions, then enter 0%.)

Estate Tax Rate: _____%
(If the donor's estate is in excess of the Exemption Equivalent)

Trust Amount: $_____
(Fair market value of property)

Cost Basis: $_____
(Cost basis of property)

Current Return: _____%
(Ordinary income currently produced by property, e.g., 2%)

Lead Trust Ordinary Return: _____%
(Estimated annual income, e.g. 4%)

Lead Trust Capital Growth: _____%
(Estimated annual growth, e.g. 1%)

Trust Payout: _____%
(Annual trust payout percentage, e.g. 6%)

Payment Frequency:
   Annual   Semi-annual   Quarterly   Monthly

Generation Skip Option: Yes   No
   GSTT Exemption: $_____
   Percent to Grandchildren: _____%

 Family Limited Partnership / Lead Trust Option
   FLP Discount Percent: _____%

Total Return Percent: _____%
(Lowest percent for graph)