

InsWord[®] on the Net (“ION”)

(Version 19.0)

List of Documents in ION

Business Buy-Sell Flow Charts

Sole Proprietor

Sole Proprietor One Way Buy-Sell
Sole Proprietor Trusteed Buy-Sell

Partnership

Partnership Buy-Sell (Cross Purchase or Entity)
Partnership Cross Purchase Buy-Sell with Trustee
Professional Partnership Entity Buy-Sell

Corporation

Corporation One Way Buy-Sell
Corporation Cross Purchase Buy-Sell
Corporation Cross Purchase Buy-Sell with Trustee
Corporation Stock Redemption Buy-Sell
Corporation Optional Stock Redemption Buy-Sell
S Corporation Stock Redemption Buy-Sell
Management Team Buy-Out Using an Insurance Partnership
Management Team Buy-Out with Trustee

Limited Liability Company

Limited Liability Company Buy-Sell (Cross Purchase or Entity)
Limited Liability Company Cross Purchase Buy-Sell with Trustee
Professional Limited Liability Company Entity Buy-Sell

Business Buy-Sell Plans

Sole Proprietor One Way Buy-Sell

Sole Proprietor Trusteed Buy-Sell

Partnership Entity Buy-Sell

Partnership Cross Purchase Buy-Sell

Partnership Cross Purchase Buy-Sell with Trustee

Professional Partnership Entity Buy-Sell

Corporation One Way Buy-Sell

Corporation Stock Redemption Buy-Sell

Corporation Optional Stock Redemption Buy-Sell
Corporation Optional Stock Redemption Buy-Sell with Trustee
Corporation Section 303 Stock Redemption
Corporation Cross Purchase Buy-Sell
Corporation Cross Purchase Buy-Sell with Trustee
S Corporation Stock Redemption Buy-Sell
Limited Liability Company Entity Buy-Sell
Limited Liability Company Cross Purchase Buy-Sell
Limited Liability Company Cross Purchase Buy-Sell with Trustee
Professional Limited Liability Company Entity Buy-Sell
Management Team Buy-Out Using a Partnership
Management Team Buy-Out with Trustee

Business Buy-Sell Plans Converting Entity or Stock Redemption Plans to Cross-Purchase

Converting Corporate Stock Redemption to Cross-Purchase Buy-Sell
Converting LLC Entity Redemption to Cross-Purchase Buy-Sell
Converting Partnership Entity Redemption to Cross-Purchase Buy-Sell

Limited Liability Company Operating Agreements

Limited Liability Company (Purpose: Asset Protection)
Professional Limited Liability Company
Family Limited Liability Company (Purpose: Asset Protection and Discount Gifting)

Family Limited Partnership Operating Agreements

Family Limited Partnership (Purpose: Asset Protection and Discount Gifting)
Family Limited Partnership (Purpose: Life Insurance Trust Substitute)

Executive Trifecta Flow Charts (Key Executive Coverage, Survivor Income Benefit, and Subsequent Transfer of Policy to Key Executive)

C Corporations
Executive Trifecta (Insured is an Executive with a Corporation)
S Corporations
Executive Trifecta (Insured is a Sole Shareholder of an S Corporation)
Executive Trifecta (Insured is one of Several Shareholders of an S Corporation)

Executive Trifecta (Multiple Shareholders of an S Corporation)
Executive Trifecta (Non-Shareholder Executive of an S Corporation)

Limited Liability Company

Executive Trifecta (Sole Member of a Limited Liability Company)
Executive Trifecta (Multiple Members of a Limited Liability Company)
Executive Trifecta (Non-Member Executive of a Limited Liability Company)

Partnerships

Executive Trifecta (Insured is one Partner of a Partnership)
Executive Trifecta (Multiple Partners of a Partnership)
Executive Trifecta (Non-Partner Executive of a Partnership)

Non-Profit Organizations

Executive Trifecta for Key Executives and Directors of Non-Profit Organization

Executive Trifecta (Key Executive Coverage, Survivor Income Benefit, and Subsequent Transfer of Policy to Key Executive)

Executive Trifecta for Key Executives and Directors
Executive Trifecta for S Corporation Shareholders, LLC Members, and Partners
Executive Trifecta for Key Executives and Directors of Non-Profit Organization

Key Employee Insurance Plan Flow Charts

Key Employee Insurance

Key Employee Insurance

Alternate Key Employee Insurance (Employee-Owned)

Alternate Key Employee Insurance (Employee-Owned)

Alternate Key Employee Insurance (Trust-Owned)

Alternate Key Employee Insurance (Trust-Owned)

Substitute Creditor Technique

Substitute Creditor Technique

Charitable Key Employee Insurance

Charitable Key Employee Insurance

Key Employee Insurance Plans

Key Employee Insurance

Alternate Key Employee Insurance (Employee-Owned)

Alternate Key Employee Insurance (Trust-Owned)

Substitute Creditor Technique

Charitable Key Employee Insurance

Transfer of Key Executive Policy to Insured

Executive Bonus Plan Flow Charts

Executive Bonus (with Unrestricted Access)

Executive Bonus (with Unrestricted Access)

Executive Bonus (with Deferred Access Using Endorsement of Policy Ownership Rights)

Executive Bonus (with Deferred Access Using Endorsement of Policy Ownership Rights)

Leveraged Executive Bonus (with Loan Regime Collateral Split Dollar to Pay Tax on Bonus- Unrestricted Access)

Executive Bonus (with Loan Regime Split Dollar to Pay Tax on Bonus)

Leveraged Executive Bonus (with Loan Regime Collateral Split Dollar to Pay Tax on Bonus – Restricted Access)

Executive Bonus Plans

Executive Bonus (with Unrestricted Access)

Executive Bonus (with Deferred Access Using Endorsement of Policy Ownership Rights)

Leveraged Executive Bonus (with Loan Regime Collateral Split Dollar to Pay Tax on Bonus)

Leveraged Executive Bonus (with Loan Regime Collateral Split Dollar to Pay Tax on Bonus – Restricted Access)

Employer-Sponsored Split Dollar Plan Flow Charts

Economic Benefit Endorsement Split Dollar

Economic Benefit Endorsement Split Dollar

Economic Benefit Endorsement Split Dollar with Optional Transfer

Economic Benefit Endorsement Split Dollar with Optional Transfer

Economic Benefit Endorsement Split Dollar with Retirement-Only Salary Continuation

Economic Benefit Endorsement Split Dollar with Retirement-Only Salary Continuation

Economic Benefit Non-Equity Collateral Assignment Split Dollar (for Minority Stockholders or Key Employees)

Economic Benefit Non-Equity Collateral Assignment Split Dollar (for Minority Stockholder or Key Employee)

Economic Benefit Non-Equity Limited Collateral Assignment Split Dollar (for Controlling Stockholders)

Economic Benefit Non-Equity Collateral Assignment Split Dollar (for Controlling Stockholder)

Economic Benefit Company-Pay-All Limited Collateral Assignment Split Dollar (for Cross-Purchase Buy-Sell)

Economic Benefit Company-Pay-All Limited Collateral Assignment Split Dollar (for Cross-Purchase Buy-Sell)

Loan Regime Collateral Assignment Split Dollar (for Minority Stockholders and Key Employees)

Loan Regime Collateral Assignment Split Dollar (for Minority Stockholders and Key Employees)

Loan Regime Limited Collateral Assignment Split Dollar (for Controlling

Stockholders)

Loan Regime Limited Collateral Assignment Split Dollar (for Controlling Stockholders)

Loan Regime Company-Pay-All Limited Collateral Assignment Split Dollar (for Cross-Purchase Buy-Sell)

Loan Regime Employer Sponsored Company-Pay-All Limited Collateral Assignment Split Dollar (for Cross-Purchase Buy-Sell)

Leveraged Deferred Compensation Using Loan Regime Split Dollar

Leveraged Deferred Compensation Using Loan Regime Split Dollar

Employer-Sponsored Split Dollar Plans

When to Use What Form of Split Dollar

Economic Benefit Endorsement Split Dollar

Economic Benefit Endorsement Split Dollar with Designated Death Benefit

Economic Benefit Endorsement Split Dollar with Optional Transfer

Economic Benefit Endorsement Split Dollar with Retirement-Only Salary Continuation

Economic Benefit Non-Equity Collateral Assignment Split Dollar (for Minority Stockholders or Key Employees)

Economic Benefit Non-Equity Limited Collateral Assignment Split Dollar (for Controlling Stockholders)

Economic Benefit Company-Pay-All Limited Collateral Assignment Split Dollar (for Cross-Purchase Buy-Sell)

Loan Regime Collateral Assignment Split Dollar (for Minority Stockholders and Key Employees) - Unrestricted Access to Cash Values

Loan Regime Collateral Assignment Split Dollar (for Minority Stockholders and Key Employees) – Restricted Access to Cash Values

Loan Regime Limited Collateral Assignment Split Dollar (for Controlling Stockholders)

Loan Regime Company-Pay-All Limited Collateral Assignment Split Dollar (for Cross-Purchase Buy-Sell)

Leveraged Deferred Compensation Using Loan Regime Split Dollar (For-Profit Organization)

Leveraged Deferred Compensation Using Loan Regime Split Dollar (Tax Exempt Organization)

Switch Dollar From Economic Benefit Endorsement Split Dollar to Loan Regime Collateral Assignment Split Dollar (for Minority Stockholders and Key Employees)

Switch Dollar From Economic Benefit Non-Equity Limited Collateral

Assignment Split Dollar to Loan Regime Limited Collateral Assignment Split Dollar (for Controlling Stockholders)

Deferred Compensation Using Loan Regime Split Dollar (For-Profit Organization)

Deferred Compensation Using Loan Regime Split Dollar (Tax Exempt Organization)

Private Split Dollar Flow Charts

Economic Benefit Private Endorsement Split Dollar

Economic Benefit Private Endorsement Split Dollar

Economic Benefit Private Non-Equity Collateral Assignment Split Dollar

Economic Benefit Private Non-Equity Collateral Assignment Split Dollar

Economic Benefit Private Non-Equity Limited Collateral Assignment Split Dollar

Economic Benefit Private Non-Equity Limited Collateral Assignment Split Dollar

Loan Regime Private Collateral Assignment Split Dollar

Loan Regime Private Collateral Assignment Split Dollar

Loan Regime Private Limited Collateral Assignment Split Dollar

Loan Regime Private Limited Collateral Assignment Split Dollar

Private Split Dollar Plans

When to Use What Form of Private Split Dollar

Economic Benefit Private Endorsement Split Dollar

Economic Benefit Private Non-Equity Collateral Assignment Split Dollar

Economic Benefit Private Non-Equity Limited Collateral Assignment Split Dollar

Loan Regime Private Collateral Assignment Split Dollar

Loan Regime Private Limited Collateral Assignment Split Dollar

Private Switch Dollar From Economic Benefit Private Endorsement Split Dollar to Loan Regime Private Collateral Assignment Split Dollar

Private Switch Dollar From Economic Benefit Private Non-Equity Limited Collateral Assignment Split Dollar to Loan Regime Private Limited Collateral Assignment Split Dollar

Undivided Interests Life Insurance Co-Ownership Plan Flow Charts

Undivided Interests Life Insurance Co-Ownership Between Employee and Employer

Undivided Interests Life Insurance Co-Ownership Between Employee and Employer

Undivided Interests Life Insurance Private Co-Ownership Between Donor and Donee

Undivided Interests life Insurance Private Co-Ownership Between Donor and Donee

Undivided Interests Life Insurance Co-Ownership Plans

Undivided Interests Life Insurance Co-Ownership Between Employee and Employer

Undivided Interests life Insurance Private Co-Ownership Between Donor and Donee

Demand Notes

Demand Note Between Commercial Lender and Borrower with Collateral Assignment of Policy

Demand Note Between Employer and Employee

Demand Note Between Parent and Child

Demand Note Between Settlor and Trust

Term Notes

Term Note Between Commercial Lender and Borrower with Collateral Assignment of Policy

Term Note Between Employer and Employee

Term Note Between Parent and Child

Term Note Between Settlor and Trust

Premium Payment Plans for Life Insurance in Trust

Collateral Assignment of Life Insurance (American Bankers Association Form No. 10)

Self-Canceling Installment Note (SCIN)

Self-Canceling Installment Note (SCIN)

GRAT/SCIN Combination

Corporate-Owned Life Insurance (COLI) Benefit Plan Flow Charts

Salary Continuation

Salary Continuation

Retirement-Only Salary Continuation

Retirement-Only Salary Continuation

Death Benefit Only Salary Continuation

Death Benefit Only Salary Continuation

Salary Reduction Deferred Compensation

Salary Reduction Deferred Compensation

Corporate-Owned Life Insurance (COLI) Benefit Plans

Salary Continuation

Retirement-Only Salary Continuation

Death Benefit Only Salary Continuation

Salary Reduction Deferred Compensation

Multi-Life Benefit Plan Flow Charts

Multi-Life Executive Bonus

Multi-Life Executive Bonus

Multi-Life Economic Benefit Endorsement Split Dollar

Multi-Life Economic Benefit Endorsement Split Dollar

Multi-Life Economic Benefit Endorsement Split Dollar with Retirement-Only Salary Continuation

Multi-Life Economic Benefit Endorsement Split Dollar with Retirement-Only Salary Continuation

Multi-Life Loan Regime Collateral Assignment Split Dollar

Multi-Life Loan Regime Collateral Assignment Split Dollar

Multi-Life Salary Continuation

Multi-Life Salary Continuation

Multi-Life Death Benefit Only Salary Continuation

Multi-Life Death Benefit Only Salary Continuation

Multi-Life Salary Reduction Deferred Compensation

Multi-Life Salary Reduction Deferred Compensation

Multi-Life Salary Reduction Deferred Compensation 401(k) “Look-a-Like”

Multi-Life Salary Reduction Deferred Compensation 401(k) “Look-a-Like”

Multi-Life Benefit Plans

Overview of the Multi-Life Benefit Plans

Multi-Life Executive Bonus

Multi-Life Economic Benefit Endorsement Split Dollar

Multi-Life Economic Benefit Endorsement Split Dollar with Retirement-Only Salary Continuation

Multi-Life Loan Regime Collateral Assignment Split Dollar

Multi-Life Salary Continuation

Multi-Life Death Benefit Only Salary Continuation

Multi-Life Salary Reduction Deferred Compensation

Multi-Life Salary Reduction Deferred Compensation 401(k) “Look-a-Like”

Severance Pay Plans

Severance Pay Plan (Profit-Making Organization) (Termination of Employment Under Any Conditions)

Severance Pay Plan (Tax Exempt Organization) (Involuntary Termination of Employment)

Section 457 Plans

Eligible Section 457(b) Deferred Compensation Plan for Governmental Organization

Eligible Section 457(b) Deferred Compensation Plan for Tax Exempt Organization

Ineligible Section 457(f) Deferred Compensation Plan for Tax Exempt and Governmental Organizations

Pension Maximization Plan

Spousal Waiver of Joint & Survivor Annuity

Retirement Planning Documents

Pension Beneficiary Designation (for Non-Spouse Beneficiary; with Spousal Waiver)

IRA Beneficiary QTIP Trust (Spouse and Children)

IRA Beneficiary Non-Spousal Trust

IRA Beneficiary Designation – Charitable Remainder Trust as Beneficiary

Corporation Health Plans

Disability Wage Continuation Plan

Medical Reimbursement Plan

Long -Term Care Insurance Plan

Wealth Transfer

Zero Estate Tax Plan Using Charitable Gifts

Wealth Transfer – Stretch IRA

Wealth Transfer – IRA with Charitable Beneficiary

Wealth Transfer – Annuity Rescue Using Life Insurance

Wealth Transfer – Annuity Rescue with Charitable Beneficiary

Private Annuity

Cohabitation Agreement

Employment Agreements

Employment Agreement

Employment Agreement for Key Executive

Declaration Regarding Final Arrangements

Wills and Powers of Attorney

Simple Will

Pourover Will

Will with Testamentary Trust

Living Will

Durable Power of Attorney for Health Care

Durable General Power of Attorney Including Durable Power of Attorney for Health Care (Outright Authorization of Power)

Durable General Power of Attorney Including Durable Power of Attorney for Health Care (Springing Authorization of Power)

Disclaimers

Qualified Disclaimer

Disclaimer Trust

Irrevocable Trusts

Irrevocable Life Insurance Trust (Income to Spouse, Principal to Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Irrevocable Life Insurance Trust (Trust Beneficiaries are the Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Irrevocable Life Insurance Trust (Trust Beneficiaries are the Children) (Funding: Life Insurance Policy or Split Dollar Interest) Second-to-Die Policy

Ultimate Irrevocable Life Insurance Trust (Loans to Grantor; Beneficiaries are Spouse and Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Ultimate Irrevocable Life Insurance Trust (Loans to Grantor; Beneficiaries are the Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Ultimate Irrevocable Life Insurance Trust (Loans to Grantor; Trust Beneficiaries are Children) (Funding: Survivorship Life Insurance Policy or

Split Dollar Interest)

Generation-Skipping Irrevocable Trust for Benefit of Grantor's Children and Other Descendants (Funding: Assets Other Than Life Insurance)

Generation-Skipping Irrevocable Life Insurance Trust for Benefit of Grantor's Children and Other Descendants (Funding: Life Insurance or Split Dollar Life Insurance)

Irrevocable Incentive Trusts

Irrevocable Life Insurance Trust with Incentive Provisions (Income to Spouse, with Children as Successor Beneficiaries) (Funding: Life Insurance Policy or Split Dollar Interest)

Irrevocable Life Insurance Trust with Incentive Provisions (Trust Beneficiaries are the Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Irrevocable Life Insurance Trust with Incentive Provisions (Trust Beneficiaries are the Children) (Funding: Life Insurance Policy or Split Dollar Interest) Second-to-Die Policy

Ultimate Irrevocable Life Insurance Trust with Incentive Provisions (Loans to Grantor; Spouse and Children as Beneficiaries) (Funding: Life Insurance Policy or Split Dollar Interest)

Ultimate Irrevocable Life Insurance Trust with Incentive Provisions (Loans to Grantor; Children as Beneficiaries) (Funding: Life Insurance Policy or Split Dollar Interest)

Ultimate Irrevocable Life Insurance Trust with Incentive Provisions (Loans to Grantor; Children as Beneficiaries) (Funding: Life Insurance Policy or Split Dollar Interest) Second-to-Die Policy

Generation-Skipping Irrevocable Trust with Incentive Provisions for Benefit of Grantor's Children and Other Descendants (Funding: Assets Other Than Life Insurance)

Generation-Skipping Irrevocable Life Insurance Trust with Incentive Provisions for Benefit of Grantor's Children and Other Descendants (Funding: Life Insurance Policy or Split Dollar Interest)

Irrevocable Total Return Unitrusts

Total Return Irrevocable Life Insurance Unitrust (Unitrust Interest to Spouse, Principal to Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Ultimate Total Return Irrevocable Life Insurance Unitrust (Loans to Grantor; Unitrust Interest to Spouse; Remainder to Children) (Funding: Life Insurance Policy or Split Dollar Interest)

Generation-Skipping Total Return Irrevocable Life Insurance Unitrust (for Benefit of Grantor's Children and Other Descendants) (Funding: Life Insurance Policy or Split Dollar Interest)

Generation-Skipping Total Return Irrevocable Unitrust (for Benefit of Grantor's Children and Other Descendants) (Funding: Assets Other Than Life Insurance)

Irrevocable Incentive Total Return Unitrusts

Total Return Irrevocable Life Insurance Unitrust with Incentive Provisions (Unitrust Interest to Spouse, with Children as Successor Beneficiaries) (Funding: Life Insurance Policy or Split Dollar Interest)

Ultimate Total Return Irrevocable Life Insurance Unitrust with Incentive Provisions (Loans to Grantor; Unitrust Interest to Spouse and Children as Successor Beneficiaries) (Funding: Life Insurance Policy or Split Dollar Interest)

Generation-Skipping Total Return Irrevocable Life Insurance Unitrust with Incentive Provisions (for Benefit of Grantor's Children and Other Descendants) (Funding: Life Insurance Policy or Split Dollar Interest)

Generation-Skipping Total Return Irrevocable Unitrust with Incentive Provisions (for Benefit of Grantor's Children and Other Descendants) (Funding: Assets Other Than Life Insurance)

Crummey Withdrawal Power Notifications

Section 6166 Installment Payment of Estate Tax

Revocable Trusts

Revocable Trust (for Benefit of Grantor and Remainder to Children)

Revocable Credit Shelter Trust (for Benefit of Grantor, Grantor's Spouse, and Remainder to Children)

Revocable Credit Shelter Trust with Qualified Domestic Trust Provision

Revocable Credit Shelter (By-Pass) Trust

Revocable Trust with Qualified Terminable Interest Property (QTIP) Provision

Other Trusts

Domestic Partner Trust

Grantor Retained Annuity Trust (GRAT)

Grantor Retained Unitrust (GRUT)

Qualified Personal Residence Trust
Qualified Personal Residence Trust Lease Agreement
Rabbi Trust
Special Needs Irrevocable Trust (for Disabled Children)
Defective Grantor Life Insurance Trust – Single Life
Defective Grantor Life Insurance Trust – Survivorship Life
Domestic Asset Protection Trust – Single Life
Domestic Asset Protection Trust – Survivorship Life
Spousal Lifetime Access Trust
Survivorship Standby Trust
Section 2503(c) Minor’s Trust
Certification of Trust
GRAT/SCIN Combination

Beneficiary’s Trust (also known as an Inheritor’s Trust)
Beneficiary’s Trust for a Sole Primary Beneficiary
Beneficiary’s Trust for Primary Beneficiaries Who are Husband and Wife

Client Letters

Attorney Engagement Letter
Broker of Record Letter
Adviser Authorization Letter
Estate Repeal or Reform
Year-End Tax Planning
Irrevocable Life Insurance Trust (ILIT) Gifting Strategies
Charitable Gifting Strategies

Individual Health Savings Accounts

Health Savings Custodial Account
Health Savings Trust Account

Charitable Gifts

Charitable Gift Annuity Joint Life Deferred
Charitable Gift Annuity Joint Life Immediate

Charitable Gift Annuity Single Life Deferred

Charitable Gift Annuity Single Life Immediate

Inter Vivos Charitable Remainder Gift of Personal Residence or Farm

Charitable Trusts

Inter Vivos Charitable Remainder Unitrust (One Life)

Inter Vivos Charitable Remainder Unitrust (Term of Years)

Inter Vivos Charitable Remainder Unitrust (Two Lives, Consecutive Interests)

Inter Vivos Charitable Remainder Unitrust (Two Lives, Concurrent and Consecutive Interests)

Inter Vivos Charitable Remainder Unitrust with Net Income Make-Up Provision (One Life)

Inter Vivos Charitable Remainder Unitrust with Net Income Make-Up Provision (Two Lives, Consecutive Interests)

Inter Vivos Charitable Remainder Unitrust with Net Income Make-Up Provision (Two Lives, Concurrent and Consecutive Interests)

Testamentary Charitable Remainder Unitrust (One Life)

Testamentary Charitable Remainder Unitrust (Term of Years)

Testamentary Charitable Remainder Unitrust (Two Lives, Consecutive Interests)

Testamentary Charitable Remainder Unitrust (Two Lives, Concurrent and Consecutive Interests)

Testamentary Charitable Remainder Unitrust with Net Income Make-Up Provision (One Life)

Testamentary Charitable Remainder Unitrust with Net Income Make-Up Provision (Two Lives, Consecutive Interests)

Testamentary Charitable Remainder Unitrust with Net Income Make-Up Provision (Two Lives, Concurrent and Consecutive Interests)

Inter Vivos Charitable Remainder Annuity Trust (One Life)

Inter Vivos Charitable Remainder Annuity Trust (Two Lives, Consecutive Interests)

Inter Vivos Charitable Remainder Annuity Trust (Two Lives, Concurrent and Consecutive Interests)

Inter Vivos Charitable Remainder Annuity Trust (Term of Years)

Testamentary Charitable Remainder Annuity Trust (One Life)

Testamentary Charitable Remainder Annuity Trust (Two Lives, Consecutive

Interests)

Testamentary Charitable Remainder Annuity Trust (Two Lives, Concurrent and Consecutive Interests)

Testamentary Charitable Remainder Annuity Trust (Term of Years)

Super Charitable Lead Annuity Trust (CLAT)

Charitable Lead Annuity Trust (CLAT)

Charitable Lead Unitrust (CLUT)

Charitable Remainder Trust – Spousal Waiver

Caregiver Employment Contract

General Sale Documents

Circular 230

IRS Resources

Estate Planning

Business Planning

Life Insurance and Annuities

Special Files

Deferred Compensation Provisions of Section 409A

Company-Owned Life Insurance Summary

Company-Owned Life Insurance – Notice and Consent Form

Company-Owned Life Insurance – Annual Reporting Form 8925

Loan Regime Split Dollar – Notice and Consent Form

Loan Regime Split Dollar – Annual Reporting Form 8925

Six Tax Traps - Company-Owned Life Insurance and Split Dollar Arrangements

Analysis of the Marketing Impact of the Final Split Dollar Regulations on Split Dollar Plans

Section 7872 Benefit Plans (Loan and Loan Interest Logic)

Plan Features of the InsMark Loan-Based Split Dollar System

Plan Features of the InsMark Loan-Based Deferred Compensation System

Section 11(d) of the Securities Exchange Act of 1934

IRS Table 2001 Rates

Insured/Grantor Access to Funds in an Irrevocable Life Insurance Trust

Federal Estate and Gift Tax Rates and Credits

Split Dollar Final Regulations

Split Dollar IRS Notice 2002-8

Split Dollar IRS Notice 2002-59

Split Dollar Rev Rul 2003-105

Life Insurance Valuation

Federal Income Tax – Certain Inflation-Adjusted Limits