

Charitable Illustration Data Sheet

Requested by: _____ Date: _____

Phone: _____ Fax: _____ Email: _____

Date and Time Needed: _____

Send by: Fax Mail Email Overnight Delivery (Check all that apply)

Client/Donor: _____ DOB _____

Spouse: _____ DOB _____

Other Beneficiary: _____ DOB _____

Other Beneficiary: _____ DOB _____

Are any beneficiaries skip persons? _____ Projected date of gift: _____

Funding Asset(s): _____ FMV _____

Cost Basis: _____ Acquisition Date: _____

Current Yield: _____ Rate of Growth: _____ Liquidate Retain in gift plan

Donor's income tax bracket: _____ Estimated estate tax bracket: _____

Capital Gains tax rate: 20% Other _____%

Type of Plan(s) to model:

Charitable Remainder Trust CRUT CRAT NICRUT NIMCRUT

If NICRUT or NIMCRUT, Spigot Flip [Flip Trigger: _____]

Payout Rate(s): 5% 6% 7% 8% _____% Legal Maximum

Term: One Life Two Lives Term of Years _____ Other _____

Payment Frequency: Annual Semiannual Quarterly

Charitable Lead Trust CLAT CLUT Lifetime Testamentary

Grantor Non-Grantor Payout Rate(s): 5% 6% 7% 8% _____%

Term of Years: _____ Payment Frequency: Annual Semiannual Quarterly

Charitable Gift Annuity Immediate Deferred [start at age _____] Flexible

Use current ACGA rates Other: _____ Range for Flexible CGA _____ to _____

Payment Frequency: Annual Semiannual Quarterly

Bargain Sale _____ % to Charity Debt/Mortgage: \$ _____

Sell asset and Reinvest (as comparison to gift plan)

Assumed rate of return: Income _____% Growth _____% Taxable Tax-free

Management fees: \$ _____ per year or _____% of Principal or Income

NOTES (Please describe gift plan):

FAX TO: 866-317-2649 Florida Philanthropic Advisors, LLC (Phone: 813-949-2979)