

New York Trust University



Asset Leveraging Trust:

Single father, age 57, had a \$400,000 stock portfolio that he was keeping for his two daughters to inherit.

The Solution:

The broker suggested that since this was earmarked for inheritance why not remove all the market risk?

Take that \$400,000 and place it in a Single Premium Life Insurance Trust that would buy \$5.2M of insurance on him that would pass income and estate tax free to his two daughters.

This immediately increased the value of that holding 1,200%.