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## Features of Wealthy and Wise<sup>®</sup> (Advanced)

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Current features in Wealthy and Wise<sup>®</sup> (Advanced) are:

- Intentionally defective grantor trust (IDGT);
- Gifts of current liquid and illiquid assets to the IDGT;
- Discounted sales of illiquid assets to an IDGT;
- Include single life and survivor life insurance in the IDGT;
- Grantor access to assets in the an IDGT using secured loans;
- One-click calculations for charitable bequests of specific liquid and illiquid assets;
- One-click calculations for Zero Estate Tax plans.

***Wealthy and Wise<sup>®</sup> (Advanced) includes all the current features of Wealthy and Wise<sup>®</sup>.***

**You can easily link import data from each benefit alternative into Wealthy and Wise<sup>®</sup> (Advanced) for retirement or estate planning.**

- Links to Executive Bonus Plan and Controlled Executive Bonus Plan
- Links to Endorsement and Collateral Assignment Split Dollar
- Links to Company-Owned Split-Dollar Funded by Loan Regime Split Dollar
- Links to Executive-Owned Split-Dollar Funded by Company Loans
- Links to Grantor Trust-Owned Loan Regime Split-Dollar Funded by Company or Personal Loans
- Links to Premium Financing Funded by Bank Loans
- Links to Grantor Trust-Owned Premium Financing Funded by Bank Loans
- Links to Premium Financing Funded by Bank Loans and Split Dollar (Personally-Owned or Grantor Trust-Owned) with Possible Deductions for Bank Loan Interest
- Links to Leveraged Executive Bonus Plans
- Links to Leveraged Deferred Compensation Plans
- Links to Leveraged 401(k) Look-Alike

Note: InsMark's Cloud-Based Documents on a Disk<sup>™</sup> has specimen documentation for most of the InsMark Illustrations that Link with Wealthy and Wise (Advanced) listed above,

***If you're not using Wealthy and Wise<sup>®</sup> (Advanced), pray your competition doesn't use it.™***

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“Documents On A Disk” is a trademark of InsMark, Inc.