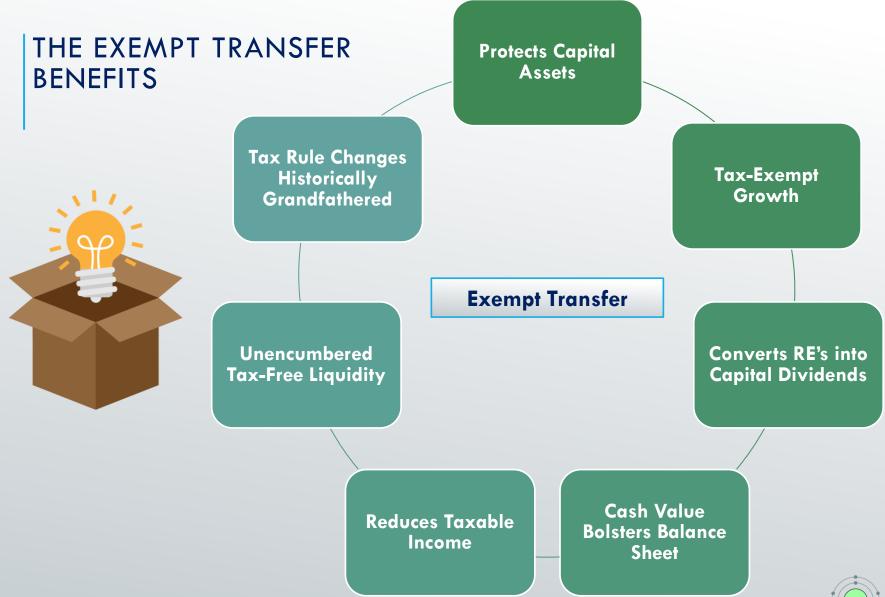
THE EXEMPT TRANSFER

An Overview







THE EXEMPT TRANSFER PROTECTS CAPITAL ASSETS

Remove The Need to Sell or Leverage Real Estate to Pay Capital Gains Tax & Recapture



Protecting Capital Assets

Prevent The Need to Sell Investment Portfolio Assets In a Down Market

Maintain
Ownership of
Important Family
Real Estate







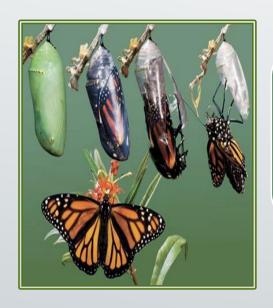
The Exempt
Transfer Returns
are Tax-Exempt

Tax-Exempt
Growth

The Exempt
Transfer Reduces
the Impact on SBD
When Passive
Income Exceeds
\$50k



THE EXEMPT TRANSFER CONVERT RETAINED EARNINGS



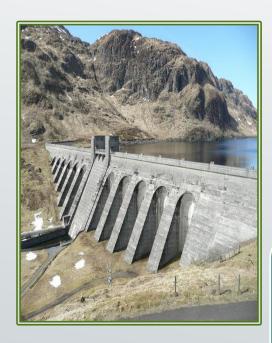
The Exempt
Transfer Converts
Retained Earnings
into Capital
Dividends

Convert Retained Earnings The Exempt
Transfer Benefits
Qualify for Capital
Dividend Account
Treatment



THE EXEMPT TRANSFER BOLSTER THE BALANCE SHEET

The Exempt Transfer Leaves More Money in the Corporation



Bolster the Corporate
Balance Sheet

The Exempt Transfer is a Liquid Asset

The Exempt Transfer
Can Be Used as
Collateral



THE EXEMPT TRANSFER REDUCE TAXABLE INCOME



The Exempt
Transfer Can
Provide
Opportunities to
Create Deductible
Cash Outflows

Reduce Taxable Income

The Exempt
Transfer Can Be
Used to Support a
Tax-Free
Retirement Income
Stream



THE EXEMPT TRANSFER UNENCUMBERED TAX-FREE LIQUIDITY

The Exempt
Transfer Buys
Time to Execute
Business
Continuity Plans



The Exempt
Transfer Provides
Capital for
Charitable Causes

Unencumbered Tax-Free Liquidity

The Exempt
Transfer Provides
Income for
Survivors

The Exempt
Transfer Provides
Capital to Fund a
Buy-Sell
Agreement

The Exempt
Transfer Provides
Capital for
Creditors

The Exempt
Transfer Provides
Capital for Tax
Liabilities



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