

Spousal Limited Access Trust

CHALLENGE: Fund tax-advantaged, protected nest egg while preserving availability of assets for needs of spouse and descendants.

SOLUTION:



BENEFITS:

- Remove assets and future appreciation from estate and, if desired, exempt them from GST tax while making them available for needs of spouse and descendants.
- Provide some protection from claims of any future creditors.
- Tax ongoing trust investment income to individual instead of the trust to maximize trust value.