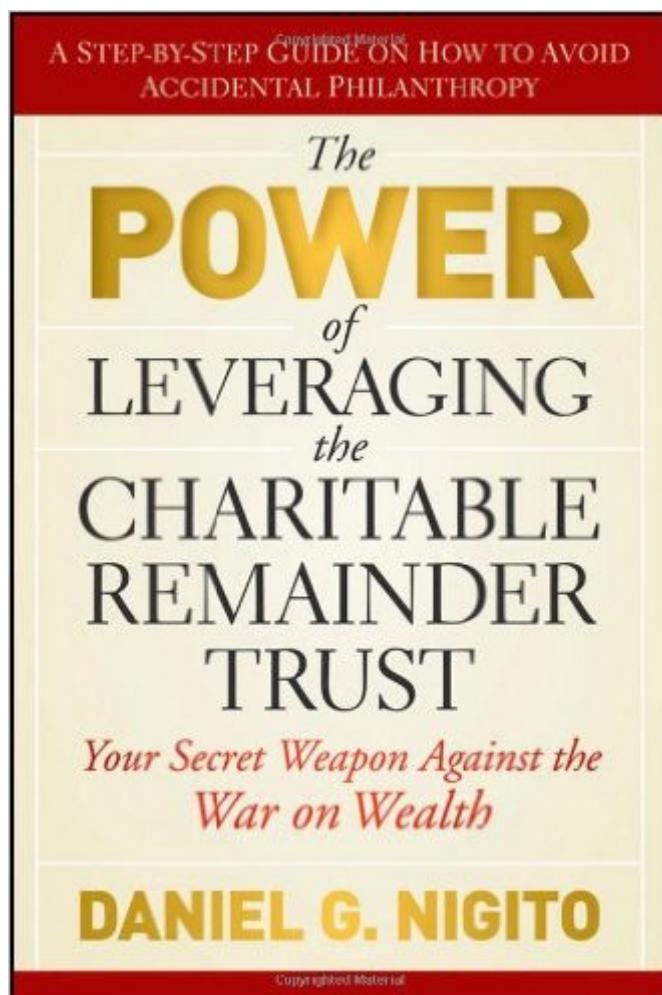


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The Power Of Leveraging The Charitable Remainder Trust: Your Secret Weapon Against The War On Wealth



Synopsis

A practical guide to avoiding accidental philanthropy and controlling your tax destiny Written by Daniel Nigito-a financial services expert whose programs have saved families millions in tax dollars and created millions more for charities across the United States-this timely guide will show you how to use the simple, yet powerful strategy known as "charitable leverage" to regain control of your financial life. This proven approach, which allows you to become a partner with charity while gaining control over your tax destiny and providing for you and your family, taps into the unique tax characteristics of two financial instruments-the Charitable Remainder Trust (CRT) and Cash Value Life Insurance (CVLI)-in order to achieve some amazing goals. Offers insights on increasing your current income while paying less tax on it Discusses how to develop real asset protection without moving your money offshore or using complicated and often questionable tax schemes Details how you can build a personal tax-deductible retirement account that does not interfere with other retirement plans The best way to avoid becoming an accidental philanthropist is by understanding how to make taxes work for you. The Power of Leveraging the Charitable Remainder Trust will show you how to do this and, in the process, add meaning to your money.

Book Information

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Customer Reviews

I think there's some okay info in this book but the author makes you work for it. The first 3 chapters reveal that you are taxed too much -- I knew that already. Chapter 4 introduces Charitable trusts. Chapter 5 huffs and puffs a bit before finally getting to beginning of his point in Figure 5.1 "The Basic Concept of Charitable Leverage -- Overview". That's where you should start reading. And

that's where your patience may be further tested by the rambling delivery because now you actually have to read it. Other reviewers commented positively on the author's witticisms. Personally I found them annoying and patronizing. Just give me the info already. Some readers may lose patience with the book and just go find a while paper on the subject.

I have been planning for a large investment that I will be cashing in soon. The amount of taxes that I will pay will be close to 41.5% in my state. This book showed me what is possible and how I can avoid paying uncle sam all those taxes right now. By using a Charitable Remainder Trust I can give more money to charities and I can push back the taxes I will pay on my investment.

Dan's Market Street Financial Advisors office is in my neighborhood, so when I hear he was writing a book I was eager to read it and understand his approach to taxes and investing. Given the current national debate on new and increased taxes, this is an extremely timely topic. Dan provides concrete information and action plans for the average investor. I was impressed on several fronts: 1. Dan has a sharp wit and an engaging writing style. He makes a subject that most of us have never heard of easy to understand and fun to read about. His personal stories and strong opinions inspire you to take control of your money. 2. Dan shows how people remain complacent as their money is taxed multiple times. He shows how the same dollar we earn is subject to tax four different times - income tax, dividend tax, capital gains tax and estate tax. And, these taxes are all increasing in the near future! His analysis of our tax national tax situation shows the tax burden the average investor faces. 3. Dan exposes how our tax dollars are given to causes we may not support. He shows how our overtaxed dollars go to government "pork" (see table 2.1 for some unbelievable examples), making us "Accidental Philanthropists". He calls this "adding insult to injury" - tax us heavily and then spend it against our wishes. 4. Dan outlines how using two simple financial tools will prevent us from becoming accidental philanthropists. In a clear and easy to understand manner he explains how the combination of The Charitable Remainder Trust and The Cash Value Life Insurance Contract create "The Power of Charitable Leverage". These tools allow people to keep more of their money and decide how the remainder will be spent. I consider myself an informed investor, but this was an eye opening book for me. Every American who wants to take control of how their hard earned money is spent should read Dan's book and consider his recommendations.

For folks like us, novices in financial matters, a clear explanation, with lots of diagrams, on how to start to get our (otherwise) tax dollars going to places that we can define, instead of the government.

Highly recommended. The author also practices what he preaches and can help all of us as a consultant too.

Dan nigo has taken a few stand alone basics of charitable giving and tax deferral strategies, and has created a symphony that I was not able to put down. My certainty about the supremacy of his content was enhanced noticing the endorsements of meters Schultz and O'Reilley.

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