



Is a Private Charity Right for YOU

You have identified a charitable need you would like to support, but your due diligence reveals an absence of reliable controls. You could make a real difference if, somehow, you could be sure your contributions would be used judiciously in order to effect the needed

You have been involved with various donor advised funds and wish you could have greater control over the investment side of the fund. There are some special investment opportunities that are of an intimate nature to you that you would like to capitalize with your donor advised fund. The directors of the charity do not agree with your investment suggestions.

You are an elderly person with a very large estate and want to defeat the estate tax.

You are in the later years of your earning career, painfully aware that now is the time to commit as much as possible to your retirement. You are frustrated by the counter-productive limitations associated with traditional retirement accounts.

You want to structure an estate plan that is powerful but flexible enough for you to make significant changes on the fly. You've been frustrated by the rigid nature of estate planning.

You desire to establish a lasting family legacy that will be the model for your children and their children. It would be a place where they could learn the value of being charitable.

You want to reduce your income taxes.

You have assets that need protection — a secure harbor — transparent, yet strong enough to withstand aggressive attacks from former business associates, ex-wives, or disaffected children.

You have seriously considered the possibility of your own private foundation and have been advised that the chapter 42 compliance issues would seriously compromise your philanthropic aspirations.

You are concerned about what you see on the political horizon. Looks like overly aggressive taxation to facilitate redistribution of your wealth. You find this concept troubling and seek out the legal, transparent, safe harbor.

You are driven by a philanthropic passion. Your past efforts lacked the satisfaction only possible with the privilege of personal involvement and control when committing your personal resources.

What We Can Do For **YOU**

- 1. Vision** – We work with you to identify your charitable vision, aspirations, passions, goals and commitments.
- 2. Inventory** – We help you inventory your resources and determine which assets are to be committed to your charitable passion.
- 3. Mission** – We author the mission, objectives and purpose of your personal private charity. It is important for you to completely embrace the core values of your private charity.
- 4. Structure** – We work with your legal and financial advisors to craft the specific charity structure using unique powerful tools designed to provide you with a very strong private charity platform.
- 5. Implementation** – We implement the plan to create and launch your private charity. Typically the legal work will be the responsibility of your personal attorney.
- 6. Review and Approval** – We review your private charity structure and plan with your legal and financial advisors to secure their approval and endorsement.
- 7. Funding** – We provide the methods of funding your private charity looking to fully deductible charitable contributions and income shifting opportunities.
- 8. Management** – We assist in the day-to-day management of your private charity. Of course you are completely in control of every aspect of your private charity.

What Does Your Private Charity Cost **YOU**

- ▶ **Planning and Setup** – You need to plan on spending between \$10,000 to \$30,000 to have a private charity established. Fees are based on the number of meetings and hours required to accomplish what is necessary to craft your private charity plan and the type of charity tools used.
- ▶ **Fund Raising** – Typical fund raising costs run between 10% to as high as 25% of the funds being raised. Fund raising costs are offset by the charitable contribution deduction given to the donor.
- ▶ **Trustee or Director Certification** – If trustee or director certification is needed, plan on \$3,000 to \$5,000 and several months of study. Arrangements can be made to have a group of your staff become certified with a special group rate.
- ▶ **Management** – You pay as you go for the services you need. The range of services and scope of work is difficult to gauge without knowing the particulars of the project.

- Transparent Asset Protection
- No Secrecy or Hidden Assets
- Accomplishing Your Social Passion
- Creating a Timeless Family Legacy
- Managing Your Significant Estate
- Complete Control of Your Wealth
- Wise Deployment of Your Social Dollars
- Productive and Effective Social Investing
- Flexible and Focused Estate Planning

A Significant Life is a Life of Compassion

Inspired Life Centers

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