SERVICES

ESTATE PLANNING
- *Estate Plan Design*
- *Disposition of Assets*
- *Estate Tax Evaluation*
- *Revocable Living Trust/Will Analysis*
- *Irrevocable Trusts*
- *Family Limited Partnerships*
- *Credit Shelter Trusts*
- *Family Gifting Strategies*
- *Incapacity Planning*
- *Wealth Transfer*
- *Estate Administration*

INVESTMENT MANAGEMENT
- *Asset Allocation*
- *Evidence-Based*
- *CEFEX Certified for Fiduciary Excellence*
- *Globally Diversified Portfolios*
- *Structured Asset Class Indexing*
- *Low-Cost and Tax-Efficient*
- *Risk/Return Analysis*
- *Concentrated Position Evaluation*
- *Stock Option Analysis*

TAX PLANNING
- *Tax Saving Techniques*
- *IRA Distribution Planning*
- *Transaction Strategies*
- *Tax Forecasting*
- *Transaction Analysis*
- *Alternative Minimum Tax Planning*

CCM Tax & Trust Administration
- *Tax Return Preparation*
- *IRS Representation*

TRUST ADMINISTRATION
Carlson Trust*
- *Corporate Trust Services*
- *Charitable Trust Administration*
- *Documentation Compliance*
- *Distribution Management*
- *Fiduciary Tax Preparation*
- *Irrevocable Trusts*

CLIENT

RETIREMENT PLANNING
- *Retirement Feasibility Analysis*
- *Cash Flow Modeling*
- *Required Minimum Distributions*
- *Designated Beneficiary Options*
- *Pension Maximization*

RETIREMENT PLANS
- *401(k) Plans*
- *403(b) Plans*
- *457 Deferred Compensation Plans*
- *IRAs*
- *Pension and Profit-Sharing Plans*
- *SIMPLE/SEP/KEOGH*

PHILANTHROPIC PLANNING
- *Directing Social Capital*
- *Strategic Gifting Strategies*
- *Donor Advised Funds*
- *Charitable Trusts*
- *Donor Legacies*

INSURANCE PLANNING
ViaForte
- *Life, Disability and Long Term Care Insurance*
- *Wealth Transfer Strategies*
- *Income Replacement Needs Analysis*
- *Long Term Care Planning*
- *Business Succession Planning*
- *Policy Implementation and Administration*

* *A Trust Representative Office of National Advisors Trust*

CARLSON
CAPITAL MANAGEMENT