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Once upon a time, Jack and his wife¹ decided that when they were both gone, they'd leave the Beanstalk² to their children³ and grandchildren⁴ in a new, neat way. They filled out the papers⁵ and lived happily ever after.

When they both died, the Big Bad Giant⁶ got no income taxes at all on the Beanstalk.

Instead, \$100,000 in the Beanstalk "rolled over" to Jack's children. They got over \$516,000 during the next 28 years.⁷ And no income taxes were due until each annual distribution was made.

Another \$100,000 of Beanstalk went to the grandchildren, who received over \$2.6 million during the next 57 years!

And again, the Giant only got income taxes when Beanstalk distributions went to the grandchildren.

So the children and grandchildren were financially happy ever after, too, since Jack knew about Beanstalk Trusts.

You don't know Jack, or his wife, or about these Trusts for your IRAs and Qualified Plans? We'll be happy to give you info and numbers for you and yours.



¹At any age!

²Their IRAs and Qualified Plans

³The oldest was 39

⁴The oldest grandchild was 9.

⁵Very necessary.

⁶I.R.S.

⁷Presumes they were earning 8% annually.