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National Association of Financial and Estate Planning
The Nation's Largest Estate Planning Organization
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All estate, retirement planning and capital gains deferral services are provided by AE-Trust in alliance with NAFEP. NAFEP provides document creation services, legal research and support, educational and marketing materials, and planning assistance. AE-Trust helps coordinate client planning through NAFEP, and then AE-Trust provides the trustee services for the trust which is included in the Self Directed Installment Sale (SDISSM).

SELF DIRECTED INSTALLMENT SALE (SDISSM)

JUNE 1, 2007

Amount of Capital Gains In Appreciated Property To Be Sold Through the SDIS SM	Price ¹
Up to \$ 400,000	\$5,290 to \$ 7,450
\$400,000 to \$1,000,000	\$6,790 to \$ 9,500
\$1,000,000 to \$5,000,000	\$8,450 to \$11,800
Over \$5,000,000	\$10,050 to \$14,500

NOTE: Additional consulting fees may be required in a given case. These are \$175 per hour, minimum of ½ hour billable.

¹ Price Includes the following services:

1. Consulting as necessary to educate client and create SDIS
2. Setup of related limited liability company (LLC) in Nevada
3. Setup of related trust for installment sale
4. Creation of resolution appointing client as LLC investment manager
5. Creation of buy-sell agreements between client and LLC
6. Installment sale note from trust to client

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