

Year-End Tax Strategy Optimized CLAT (OCLAT)

Transfer \$1M to 30-Year OCLAT:



\$1M

UPFRONT TAX DEDUCTION

(lowering your tax bill by \$300-500k in April)

\$3M

DONATIONS TO CHARITY

paid from OCLAT to charities selected by you over 30-year-term.



ASSETS RETURNED TO YOU

OCLAT Annual Investment
Rate of Return

8% Stocks

10% Private equity

15% Homerun

Assets Returned to Donor at Year 30

\$5M

\$12M

\$60M



OCLAT assets may be transferred back to you (without income taxes) or, better yet, gifted to your children or heirs (without income taxes and without 40% gift/inheritance taxes)

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BARRON'S FORTUNE Forbes

Pedigree & Credentials



Published in Barron's, Forbes, and Fortune



OCLAT strategy featured as cover article of top national legal journal (Estate Planning Journal)



Zero known IRS audits

(IRS Circular 230: audit risk should not be considered when making a tax planning decision; we cannot guarantee the absence of an audit)



Entire setup process handled exclusively by OCLAT developer Jonathon Morrison



180+ OCLATs funded with \$500m+ in charitable contributions



Peer-reviewed



One-time, upfront, tax-deductible setup fee

(no charge for annual reviews and most future OCLAT-related transactions/amendments; audit defense fees included)



48-hour turnaround

if necessary (expedited surcharge may apply)



All OCLAT features firmly supported by Tax Code & IRS rulings

PROJECTIONS EFFECTIVE
AS OF Q4 2024

[OCLAT Overview](#)

[Estate Planning
Journal Article](#)

[FAQs](#)

[Bio](#)