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)

$3.5M

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

ASSETS RETURNED TO YOU

OCLAT Annual Investment Rate of Return	Assets Returned to Donor at Year 30
6% Bonds	$1M
8% Stocks	$4.5M
10% Private equity	$12M
15% Homerun	$60M

PROJECTIONS EFFECTIVE AS OF Q3 2026

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
- **250** OCLATs funded with **$1B+** 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

LINKS

OCLAT Overview | Estate Planning Journal Article | FAQs | Bio