

There will be no estate taxes. The value of the PPVA Investment Account is included in the taxable estate, but there is a dollar-for-dollar estate charitable tax deduction.

From: Richard Kahn [REDACTED]
Sent: Friday, June 06, 2014 1:30 PM
To: Michael Liebeskind
Cc: Brian Gartner
Subject: Re: Private Placement Variable Annuity (PPVA) Investment Account

i do remember if we spoke about estate taxes
if at death funds are going to charity are they out of your estate
assume they are includable if individual has in his name at death
please advise
thank you

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On Jun 6, 2014, at 8:31 AM, Michael Liebeskind <[REDACTED]> wrote:

Rich,

It was a pleasure speaking with you. Good luck with your meeting.

Thanks to Paul for making the connection.

Michael

From: Richard Kahn [REDACTED]
Sent: Thursday, June 05, 2014 8:58 PM
To: Brian Gartner
Cc: [REDACTED]; Michael Liebeskind
Subject: Re: Private Placement Variable Annuity (PPVA) Investment Account

Thank you both for your time this afternoon
Conversation was very useful and I look forward to presenting PPVA to my principal
I will be back in touch tomorrow or Monday
Have a nice evening

Rich