



Robert and Beverly Sample Charitable Remainder Unitrust

2011 ANNUAL TRUST SUMMARY REPORT

Date of the Initial Creation of the Trust	January 22, 2001	
Inception Date of Administration by Family Legacy	January 22, 2001	
Type of Trust	Standard Charitable Remainder Unitrust	
Annual Trust Payout Rate	12.00%	
TOTAL CONTRIBUTIONS MADE TO the Trust Since Inception*	\$ 903,986.72	*Unless otherwise provided by the trustee, this amount only includes contributions made to the trust since Family Legacy has been serving as administrator.
TOTAL DISTRIBUTIONS PAID FROM the Trust Since Inception*	\$ 837,131.31	*Unless otherwise provided by the trustee, this amount only includes distributions paid out of the trust since Family Legacy has been serving as administrator.
TOTAL TAXES SAVED BY the Trust Since Inception**	\$ 70,194.26	*Unless otherwise provided by the trustee, this amount only includes taxes saved by the trust since Family Legacy has been serving as administrator.
CURRENT MARKET VALUE of the Trust as of December 31, 2010	\$ 649,802.00	To Be Paid Quarterly
2012 Scheduled Annual Payout Amount	\$ 77,976.24	\$ 19,494.06

**This is an estimate only of the total federal taxes that were potentially saved due to the creation and existence of the trust whether or not the tax savings were actually received or applied. This number is not meant to be used in any official capacity but simply for general reference purposes.

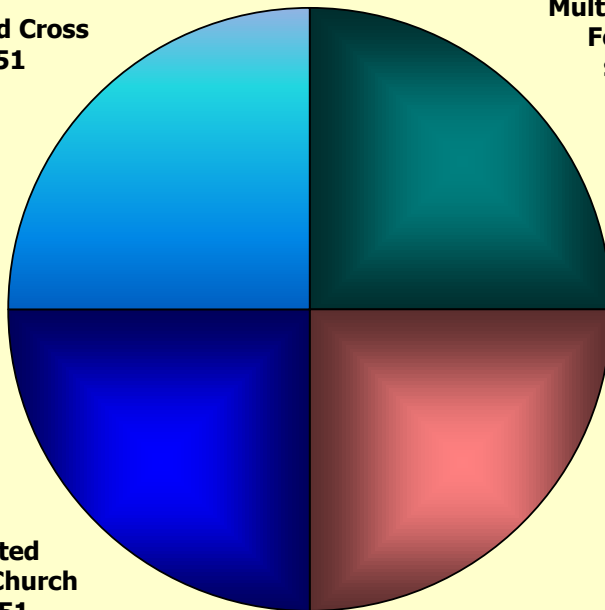
Charitable Beneficiaries

American Red Cross
\$162,451
25%

Multiple Sclerosis Foundation
\$162,451
25%

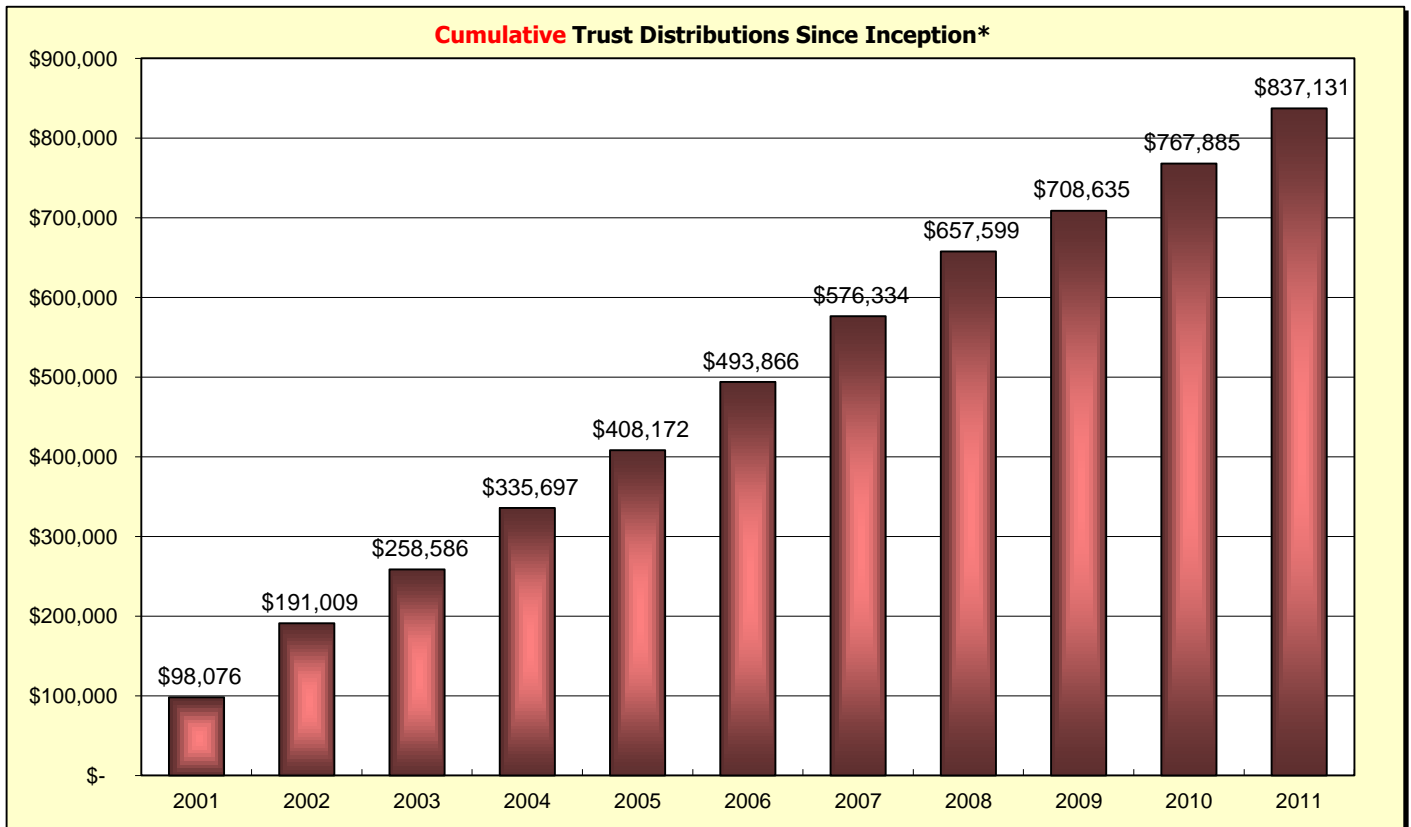
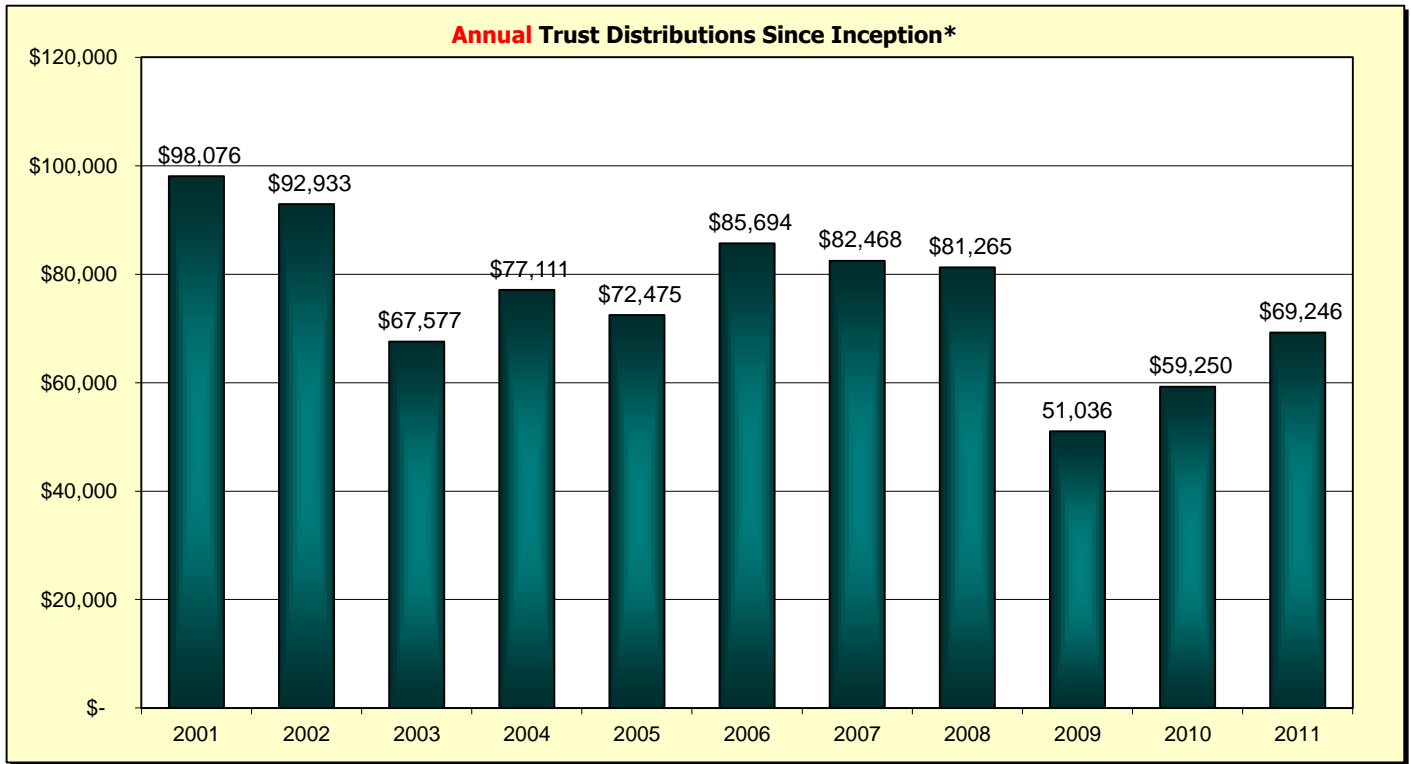
First United Methodist Church
\$162,451
25%

American Heart Association - Austin
\$162,451
25%





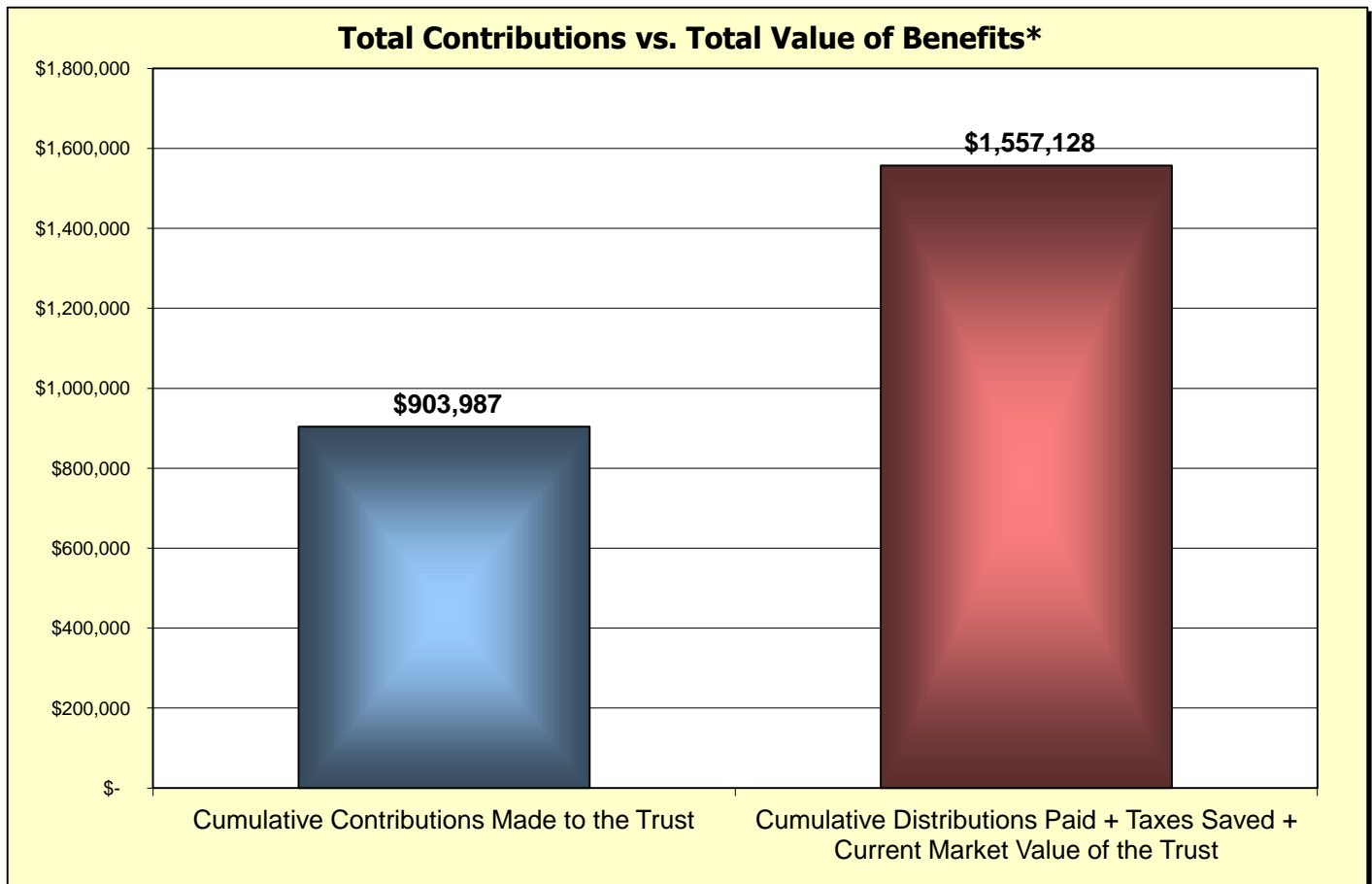
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*Unless otherwise provided by the trustee, these amounts only include distributions paid out of the trust since Family Legacy has been serving as administrator.



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*Unless otherwise provided by the trustee, these amounts only include values from the trust accounted for since Family Legacy began serving as administrator.

The Charitable Trust is an extremely powerful financial, tax and estate planning tool that renders benefits both now to the Income Beneficiaries and ultimately to the Remainder Beneficiaries.

The chart above summarizes the totality of benefits that you have received from the establishment and existence of your Trust.

The bar on the left represents the total contributions that have been made to the Trust. The bar on the right illustrates the sum total of ALL of the benefits that have been received by the Grantors in addition to the now current market value of the Trust.

This chart is meant purely for reference purposes and in no way guarantees that all the benefits of the Trust have in fact been taken or applied by the Grantors. For further information regarding your Charitable Trust, please contact your Financial Advisor. For information regarding the Administration of your trust, please feel free to contact our office at 972-620-2020 ext. 110 or by email at info@legacyadmin.com.