

LAW OFFICES OF  
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## INFORMATION FOR CRT CALCULATIONS

**GRANTOR #1:** \_\_\_\_\_ Birthdate: \_\_\_\_\_

**GRANTOR #2:** \_\_\_\_\_ Birthdate: \_\_\_\_\_

### PROPERTY:

Type:  Real Property:  Residential  Income  
 Other: \_\_\_\_\_

- Values:
- 1) Date of Purchase: \_\_\_\_\_
  - 2) Purchase Price: \$ \_\_\_\_\_
  - 3) Improvements: \$ \_\_\_\_\_
  - 4) Depreciation: \$ \_\_\_\_\_  
 Straightline  Accelerated (will be recapture)
  - 5) COST BASIS: \$ \_\_\_\_\_
  - 6) FMV: \$ \_\_\_\_\_  
How Determined: \_\_\_\_\_
  - 7) Debt on property: \$ \_\_\_\_\_  
Details: \_\_\_\_\_
  - 8) Annual Net Income: \$ \_\_\_\_\_

- Dates:
- 1) Date property to be put into trust: \_\_\_\_\_
  - 2) Improvements: \$ \_\_\_\_\_

### TYPE OF CRT:

- Annuity (Fixed \$) Client wants \$ \_\_\_\_\_ per yr  
 Standard (Fixed %) Client wants \_\_\_\_\_ % per yr  
 Net Income (%) Client wants \_\_\_\_\_ % per yr  
 Net Income w/ makeup Client wants \_\_\_\_\_ % per yr  
 Flip  
a) Net Income for/until \_\_\_\_\_; then  
b)  Standard CRT  Net Income w/Makeup CRT  
c) Client wants \_\_\_\_\_ % per yr;  
d) FLIP TRIGGER DATE: \_\_\_\_\_

Payout Period:  Monthly  Quarterly  Annually

Assume: \_\_\_\_\_ % earnings on trust assets.

Tax Rate \_\_\_\_\_ % Federal \_\_\_\_\_ % State OR Taxable Income/yr \$ \_\_\_\_\_

### REQUESTED CALCULATIONS:

- Calculate maximum payout percentage possible  
 Run at the following percentages: \_\_\_\_\_ % \_\_\_\_\_ % \_\_\_\_\_ %  
 Run income analysis (Sell vs. Keep spreadsheets)