



# Philanthropically Focused Clients

## About the Client

Mark and Barbara were a married couple in their 60s. Mark is a Managing Director at a large Private Equity firm. Over the years, their net worth has grown substantially as has their desire to be philanthropic.

## Goals

- They desired to leave the majority of their estate to various charities and/or a Family Foundation
- Consider children's future financial needs

## Primary Considerations

- Balancing charitable goals with children's security
- Majority of estate is comprised of illiquid assets and business interests
- Clients' estate plan is utilizing full marital deduction

## Our Strategy

The Coyle team partnered with the clients and their advisory team to develop a plan, leveraging prior planning with additional liquidity to meet their goals.

- Coyle coordinated placement of a portfolio of Survivorship coverage to be owned by an existing funded family trust
- Insurance ultimately provides immediate liquidity for children— balancing the illiquid nature of the estate and significant charitable commitments
- Portfolio was arranged under Private Split Dollar to fund premiums, facilitate gifting, and enhance overall leverage

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