ATLANTIC TRUST

PRIVATE WEALTH MANAGEMENT

ATLANTIC TRUST EXPERT COMMENTARIES

Atlantic Trust's senior investment experts and wealth strategists have written the educational commentaries and white papers listed below. These materials are available online at **www.atlantictrust.com** or in print by request from your local Atlantic Trust office.

Investment Planning Updates

Quarterly Commentaries

- **Atlantic Trust *Advisor***
- **Economic and Investment Overview**
- **Invesco Economic Outlook**
- **A Fresh Look at Hedge Funds**
- **Bank Loan Themes**
- **Can Commodities Benefit Your Portfolio?**
- **Challenges Facing Active Management**
- **Disciplined Equity Investment Strategy**
- **Inflation Expectations**
- **Muti-Manager Investment Program**
- **Municipal Market Update**
- **Real Estate: Thinking Beyond Personal Residencies**
- **Socially Responsible Investing**

CIO Investment Updates

- **11.2.2011: CIO Market Update on the Eurozone Crisis**
- **9.28.2011: Asset Allocation Update**
- **8.9.2011: U.S. Debt Downgrade Accelerates Volatility**
- **8.3.2011: Moving Past the Debt Deal**
- **7.29.2011: U.S. Debt Crisis**
- **7.5.2011: U.S. Job Market Update**

Trust and Wealth Planning Updates

2010 Tax Law Changes

- **2010 Tax Law Changes**
  Summary of Key Provisions
- **2010 Tax Changes: Impact of the Law on Estate Planning**
  Existing Estate Plans and Lifetime Gifts
- **2010 Tax Changes: Considerations Before Engaging in a Lifetime Gift Program**
  Thinking Through Lifetime Gift Planning
- **2010 Tax Changes: Take Advantage of Opportunities without Affecting Your Lifestyle**
  Lifetime Credit Shelter Trusts

Financial Education

- **The 20-Somethings: A Decade of Teachable Moments**
  The Importance of Financial Education
- **Financial Education Booklet**

Tax & Estate Planning

- **Advanced Planning Alternatives**
  Planning Matrix
- **Annual Exclusion Gifts**
  First Line of Offense
- **Basic Estate and Gift Planning**
  The Most Meaningful First Step
- **Charitable Giving Alternatives**
  Planning Matrix
- **Estate Plan Checkup for the New Year**
  A New Year's Resolution
- **Estate Planning with Retirement Assets**
  An Often Overlooked Planning Opportunity
- **Funding Education for Children and Grandchildren**
  It's Never too Early to Start
- **Gifting to Grandchildren**
  A Grandparent's Lasting Legacy
- **Grantor Trusts**
  Give Your Estate Plan a Boost
- **Lifetime Charitable Gifts**
  Choosing the Assets to Donate
- **Planning with Real Estate**
  Planning Matrix

Family & Legacy Planning

- **Legacy Planning: It's Not About the Money**
  What Does Your Family Wealth Really Mean?
- **Donor Advised Fund**
  Making Charitable Giving Easy
- **A Family Affair: Strengthening the Ties that Bind**
  Family Legacy Planning in Difficult Times

Family & Legacy Planning (continued)

- **Family Office**
  Making Your Life Easier
- **Life Insurance**
  Protecting Your Loved Ones, Shielding Your Assets
- **Preserving Family Wealth**
  Asset Protection Strategies
- **Private Foundation**
  Creating Your Own Family Legacy
- **Private Trust Company**
  What Is a Private Trust Company?
- **Section 529 Plans**
  An Education Funding Option
- **The Most Meaningful Legacy**
  Creating an Ethical Will
- **You, Your Wealth and Your Most Important Partner**
  Making the Right Choice for Wealth Management

Trust Planning

- **Charitable Lead Trust**
  Leveraging the Gift Tax Exemption
- **Charitable Remainder Trust**
  Where Philantropy and Tax Savings Meet
- **Choosing a Trustee**
  Making the Right Choices for Your Family
- **Choosing Trust Situs**
  To Meet Client Objectives
- **Dynasty Trusts**
  Keep It in the Family
- **Grantor Retained Annuity Trust (GRAT)**
  Give Your Estate Plan a Boost
- **Installment Sale to Defective Grantor Trust**
  A Great Planning Strategy
- **Irrevocable Life Insurance Trust**
  Enhanced Liquidity Planning
- **Now Is the Ideal Time to Take Stock of Old Trusts**
  Fixing Old Problems and Preventing New Ones
- **A Trustee's Delicate Balance**
  Serving Both Current and Future Beneficiaries

Trust Planning (continued)

- **Outright Gifts and Dynasty Trusts**
  Differing Strategies to Give Your Family Wealth
- **Outright Gifts to Grantor Trusts**
  Strategies for Family Wealth
- **Qualified Personal Residence Trust**
  Preserving Family Homes

Retirement Planning

- **Moving to Florida**
  The Sunny Side of Savings
- **To Roth or Not to Roth**
  Your Retirement Account

Foundation Source White Papers

Foundation Source, one of Atlantic Trust's strategic partners, is a leading provider of support service for private foundations.

- **7 Year-End Pitfalls to Avoid in Foundation Planning**
- **Engaging the Family in Your Philanthropy**
- **Getting to Know Foundation Source**
- **Grantmaking Transformed**
  Eliminate the Burden of Grant Applications
- **Hallmarks of a Well-Run Foundation**
- **Private Foundations, Community Foundations & Donor-Advised Funds**
- **Privately Held Stock within a Private Foundation**
- **A Side-By-Side Comparison of Private Foundations and Donor-Advised Funds**
- **Strategic Philanthropy**
  Five Approaches for Making a Difference
- **Taking Your Foundation to the Next Level**
  Five Keys to Success