

14 Reasons Why We Think Our Clients Should Consider The Wealth Preservation Strategy

Most savvy investors are knowledgeable about 1031 exchanges and installments sales but very rarely are they familiar with a Wealth Preservation Strategy (even though this type of special trust has been around since 1969). Most sellers are surprised to learn of the features this strategy offers beyond “just saving on taxes” even though that is the principal advantage sellers seek at the time of sale. Listed below are fourteen compelling attributes of the Wealth Preservation Strategy – if more property owners were aware of it, they’d be able to save on unnecessary taxes!

1. Ability to avoid current taxation on the sale of your property.
2. No limit to the amount of current taxable gain you can avoid.
3. No limit to the amount of depreciation recapture you can avoid.
4. No requirement to immediately reinvest back into property.
5. No requirement to reinvest in equal value property.
6. Ability to receive income from your assets when you need it, on a tax-advantaged basis.
7. Ability to defer the income from your assets until you actually need the income.
8. Ability to diversify your assets to minimize risk.
9. Ability to increase your basis on all new properties purchased to reduce future taxable gain, and to increase current depreciation
10. Ability to protect your assets against creditors and lawsuit judgments.
11. Ability to pass on any amount of assets to your beneficiaries. Estate tax free.
12. Access to funds for emergencies and opportunities.
13. Ability to deduct suspended carryover losses on sale of the property while current taxation is avoided.
14. Ability to sell property without increasing the asking price to factor in taxes to be paid.

*We will show you how to discover if this strategy is appropriate for you,
so that you can save money on taxes, provide a long-term financial planning tool,
protect your assets, and, most effectively, plan for wealth transfer.*

Call Today for Your FREE Report: Sellers Guide To The Wealth Preservation Strategy

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