Tax Planning Service

THE LAW OFFICE OF JASON CARR PLLC

SERVICE OVERVIEW

Our tax planning practice provides a complete array of tax planning services, depending on your unique goals and objectives. Although there is rarely a single "silver bullet" that melts taxes away, there are strategies that may be legally used to reduce your tax burden.

The key to accomplishing your financial goals, with a minimum of interference from taxes, is timing, combining, and sequencing various strategies. Here are sample options we evaluate when designing your plan:

Business Entities/Operations

- Partnership
- S corporation
- C corporation
- Business asset segregation
- Reasonable compensation
- Management company
- Captive insurance
- IC-DISC
- R&D credits
- Corporate owned life ins.
- Split-dollar life insurance
- Cash vs. accrual

Business Benefits

- Family employment
- 280A(g) plan/ "Augusta Rule"
- Home office
- Accountable expense plan
- MERP
- Overtime plan
- De Minimis fringe benefits
- Education assistance plan
- Private Placement Life

Family Tax Planning

- Gift-leaseback
- Upstream/downstream
- Pooled Income Fund
- Family employment
- Children's Roth IRA

Charitable Gifts

- Gifts of appreciated assets
- Donor Advised Fund
- Pooled Income Fund
- Charitable Remainder Trust
- Charitable Lead Trust
- Charitable Holding Company
- Private foundation
- Leveraged donations
- Qualified Charitable Distributions

Retirement Strategies

- Simplified Employee Pension
- SIMPLE IRA
- 401(k)/SIMPLE 401(k)
- Defined benefit plan
- Cash balance plan
- Nonqualified deferred comp
- Life insurance retirement plan
- Charitable Remainder Trust
- Corporate-owned life insurance
- Split-dollar life insurance
- Premium financing
- Roth IRA conversion
- 72(t) withdrawals

Real Estate Strategies

- Cost segregation
- Tangible property regulations
- Management company
- 1031 exchange
- Delaware statutory trust
- Real estate professional status
- Passive loss rescue

Exit Strategies

- 1031/1031 TIC/1031 DST
- Qualified Opportunity Fund
- Installment sale
- Structured sale
- Intermediated installment sale
- Charitable Remainder Trust
- Charitable Lead Trust
- Pooled Income Fund
- Qualified Small Business Stock
- Employee Stock Ownership Plan
- Private Placement Life Insurance
- Oil & gas offsets

CONNECT

Jason Carr JD, LLM
214.800.2366
jcarr@carrtaxlaw.com
www.carrtaxlaw.com