

A comprehensive overview of tax planning strategies designed to help individuals and businesses minimize tax liabilities while maximizing financial benefits. Covering real estate strategies, exit strategies, business operations, family tax planning, charitable giving, and retirement strategies, the guide outlines various legal methods to optimize tax efficiency and wealth preservation.

## 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 insurance
- 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 compensation
- 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

**Contact Us Today For a Free Consultation**

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