

We are currently using We have used in the past We would like to learn more

Real Estate Cost Segregation Study

Shifting income to children on payroll

Spouse on payroll with a retirement plan

Entity Organization and Restructuring with a Management Service Organization

Health Savings Accounts / Flexible Spending Accounts

Research and Development Credits

Employee Deferred Compensation Plans

Agusta Rule

Defined Benefit Combination Plan

Roth 401k

Roth Conversions

Mega Back Door Roth Conversions

Premium Financed Life Insurance

Private Placement Insurance

Opportunity Zone Funds

Tangible Property Tax Methods

Captive Insurance Structure

Restrictive Property Trusts

Donor Advised Funds

Business Sale: Tax Deferred Installment Sale

Split Interest Charitable Trust

Delaware Statutory Trust

Disclosure:

The following items are not financial recommendations, nor should they be taken as financial advice. This form is solely for informational purposes and is to be used for us to determine what different solutions and strategies are currently being used and looked at. We are not recommending any financial strategies and none of the above should be explored without consulting a tax and financial professional.