

Auto Dealership Owner in Charlotte, NC Defers \$19 million in Taxes for 30 Years

Results

Rather than paying **\$19 million** in tax today, investing that amount at just a **5% rate** for **30 years**, turns the balance to an incredible **\$82 million** dollars. At the end of the 30 years the **\$19 million** of tax would be paid, leaving a **\$63 million** dollar increase in the client's net worth, just by using this tax deferral method!

Background

A successful business was being prepared for sale for approximately \$84 million dollars with a \$64 million-dollar gain. The gain was expected to generate \$19 million in IRS taxes due!

Plan



We implemented a strategic tax sale opportunity, that allows the client to defer paying the taxes on the business sale for 30 years. In the meantime, the client has full access to invest the proceeds in full for the 30 years.