

The Tax-Smart Cashout

Maximize the value.
Minimize the taxes.
Protect your retirement.



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A Better Tax Strategy

After all these years of hard work, you're getting ready for retirement.

You've got a financial plan: you've acquired and maintained a valuable asset that you plan to sell for a profit that can help fund your retirement. Maybe you've built a lot of equity in a thriving business. Maybe you've acquired and developed a valuable property portfolio. Or perhaps you've invested in a priceless work of art, a yacht, or another highly valued object. Now that you're ready to step back, all you need to do is cash out the equity in that asset and use the profits to fund a long and comfortable retirement.

So why is the thought of cashing out keeping you up at night?





Because you've probably realized that liquidating any major asset is a complex, daunting process. It triggers major tax events that can have huge implications for the take-home value of the sale. With federal and state capital gains taxes — and potentially depreciation recapture taxes as well — you may take a major hit on the profits. Depending on your individual situation and what state you live in, you could face a massive tax burden, possibly reducing earnings from the sale of your assets by a third or more.

And once you've collected the sale proceeds, then comes the complex question of how to protect them over the long term. Turning a one-time sale into a lasting legacy or a lifetime of income is a complicated process — but one that's vital to your family's financial future.

All that, when all you want to do is get ready to enjoy your retirement.

Fortunately, there's a solution: a tax-savvy investment team that understands the complexities of major asset sales and knows how to help you navigate them to a financially secure retirement and a lifetime of stable income.





At **Tactical Wealth**, we help investors, proprietors, and asset holders from the very beginning of the sales process — before properties and assets are even listed for sale. We design pre-sale tax-advantaged solutions and investment strategies that prepare them to appraise, list, and sell assets at their most beneficial value. Then we help our clients reinvest profits in a way that reduces the tax burden from liquidating a major asset — allowing them to keep more of the profits for their future.

How? We'll help you structure the sale to minimize, or even eliminate, the taxes on the proceeds and then invest those earnings into a secure, stable long-term structure that meets your lifetime income needs — whether that means withdrawing monthly payments to replace your income or preserving your principal and accumulating interest. Together, we can create a customized strategy for your sale that will minimize your taxes, maximize the sale value, and turn your profits into a lasting financial legacy.



Why Tactical Wealth?

If you're planning on selling any major asset — be it an investment property or a business — you're at risk of writing a big check to the IRS. Whatever the asset, capital gains tax can eat up a significant portion of the proceeds. And if you have used 1031 exchange rollovers to defer your tax burden on property investments, those taxes will come due when you decide to get out of the real estate investment game. Sell your asset without a strategy to minimize those taxes, and a lot of your hard-earned equity will disappear before the ink is dry on the sale contract.

So why choose Tactical Wealth to create that strategy? At first glance, turning to a fixed income fund provider may not seem like the most intuitive strategy to manage capital gains taxes. After all, you may or may not need an additional source of stable monthly income once you retire. Or you may already have an investment vehicle you're planning to use for your retirement income, such as an IRA or 401K.

So here's why you should consider Tactical Wealth. We don't simply offer financial solutions that protect your valuable assets from taxes and turn the value into stable monthly income. We create shrewd financial structures and strategies that help our investors maximize the profits that will secure their financial future in retirement.



At the core of those strategies is our specially designed Tactical Wealth Fixed Income Fund (TWFIF). Before you list a property for sale or begin working with a broker, our pre-sale tax advantaged structures can help you save on taxes and 1031 exchange rollovers.

We use the TWFIF not only to generate steady, predictable monthly income for many retirees, but as a strategic investment vehicle to help owners like you who are looking to minimize their taxes and maximize their profits on a major asset sale. Simply by transferring your assets to a customized tax structure in the TWFIF before you liquidate, you can sidestep painful capital gains taxes and take home as much of the profits as possible. Then, you can collect a stable monthly income, reinvest as much of your earnings as you want, and enjoy a diversified investment portfolio.



And since it's backed by the stable, consistent value of one of the oldest assets possible — real estate — the **TWFIF is an ideal safe harbor for investors looking to turn a major one-time sale into a lasting foundation of financial security.**

Our fund is secured by carefully vetted mortgage investments, so we can ensure that your profits are invested in a fund that's safely backed by real, tangible assets — ones that have been carefully selected and rigorously screened to ensure they meet our impeccable investment standards.

It all starts by working with one of our advisors to create a customized asset sale and investment solution that will allow you to liquidate your capital asset with minimal taxes and maximum profit. Here's how.





Tactical Wealth advantages

Why trust Tactical Wealth with the tax strategy for your asset sale?



Maximize profits from mortgaged properties: Our fund is uniquely designed to accelerate the payoffs that can stand between you and a speedy, profitable liquidation by paying off the outstanding balance on property loans before you sell.



Protection and stability: Assets transferred to our fund can be sheltered from both immediate tax obligations and long-term market fluctuations.



No fees: Our fund includes absolutely no sales fees, riders, or administrative costs that come out of your principal. Administration, filings, and tax returns are all provided at no cost to you.



Stable lifetime income: If you need a replacement for your salary, your investment can be structured to provide reliable, consistent monthly payouts and interest for increased income.



Designated beneficiaries: With our tax strategies, you can choose who benefits from the value of your financial legacy.



Unbeatable interest: Our fund returns an average of 4 to 5 percent on 10-year investments, with rates as high as 5.75% for longer investments. That's an unbeatable return for a fixed income investment vehicle.



Extensive due diligence: We have a rigorous due diligence package that maps each asset sale tax elimination strategy back to specific IRS regulations that you can share with your CPA and legal team to review and validate.



How Our Strategies **Work For You**

Let's take an in-depth look at how Tactical Wealth solutions can help owners like you minimize the tax penalties on the sale of their capital assets. Here are a few examples, each with a different type of asset for sale.

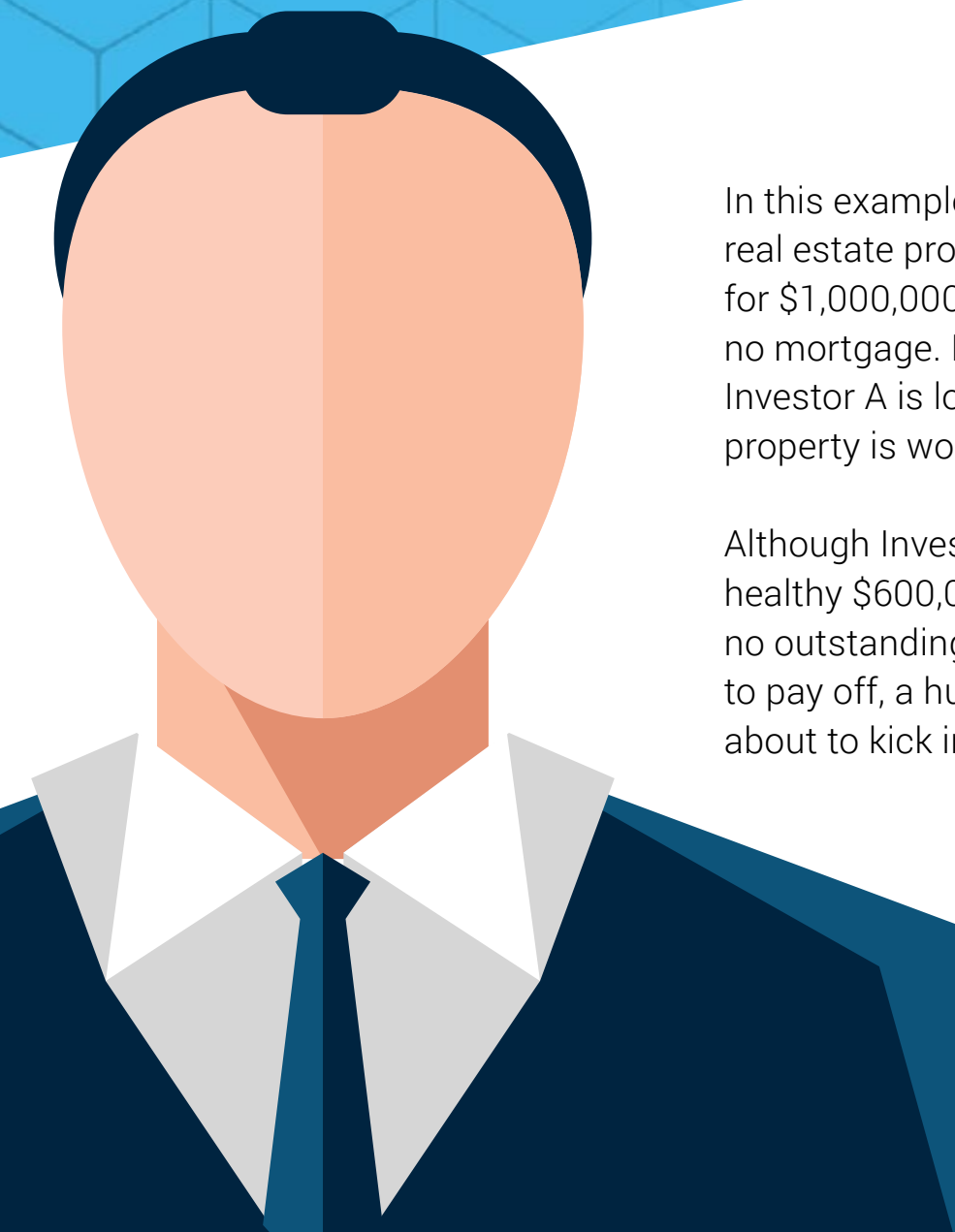
Selling an Investment Property

Tactical Wealth solutions are the ideal vehicle for owners looking to sell a real estate investment such as a rental property — even when that property has an outstanding loan attached to it. Our strategies can help you avoid capital gains taxes and depreciation recapture taxes, and even rid yourself of deferred taxes on prior 1031 exchange rollovers. It's a very powerful tax elimination strategy, but it's not surprising that many realtors don't know about it: realtors are not tax experts.

Let's take a closer look at how it works.

INVESTOR A:

Unleveraged Investment Property



In this example, Investor A owns a real estate property that he purchased for \$1,000,000 in cash and thus has no mortgage. Now, years later, when Investor A is looking to sell, that property is worth \$1.6 million.

Although Investor A stands to realize a healthy \$600,000 in net profit, and has no outstanding loans on the property to pay off, a huge bundle of taxes are about to kick in:

**INVESTOR A****FEDERAL LONG-TERM CAPITAL GAINS TAX:**

For an individual earning more than \$434,551 in yearly income, capital gains taxes can be fairly steep. For instance, federal capital gains taxes for this tax bracket amount to 20 percent of the \$600,000 gross profit, or \$120,000 of long term capital gains tax.

DEPRECIATION RECAPTURE TAX:

For an investment property, the federal government allows owners to deduct the cost of the property over time through depreciation — in this example, that amount is \$1,000,000.

Being a shrewd business owner, Investor A has depreciated the full cost of the property, reducing his basis down to zero. Now that the investor is selling the property at a profit, however, the government wants those write-offs back. This is called depreciation recapture and is essentially another tax — 25 percent, or another \$250,000 of additional tax to be exact.

FEDERAL NET INVESTMENT INCOME TAX:

Investor A's capital gains now put him over the threshold to trigger net investment income taxes at a rate of 3.8 percent of net profit, or \$22,800.

STATE LONG-TERM CAPITAL GAINS TAX:

Now let's say Investor A lives in a state that collects income taxes, one with a hefty capital gains tax rate like California, where the current rate is tiered up to 13.3 percent. Since states don't have depreciation recapture, they tax the gain between sale price and adjusted basis (which is zero thanks to depreciation) making the full \$1.6 million taxable. That can add another \$212,800 of tax.

**INVESTOR A**

In total, the tax impact on net sale proceeds in this example is almost 38 percent, or \$605,600! That hurts. On a sale of \$1.6 million, the owner would be left with less than \$995,000 of cash. That's even less than the original \$1 million he paid for the property (due to the amount saved in depreciation write-offs over the lifetime of ownership).



How **Tactical Wealth** Can Help Investor A: Maximizing the Profit on an Unleveraged Property

Instead of simply pocketing the proceeds from the sale of the investment property — and paying taxes on those capital gains — Investor A works with Tactical Wealth to arrange a strategic transfer of the investment property that eliminates the taxes on the sale of that asset.

Our specialized fund, the Tactical Wealth Fixed Income Fund (TWFIF), was designed to facilitate this approach. Strategically designed for maximum stability, tax mitigation, and market insulation, the TWFIF is

**INVESTOR A**

an ideal vehicle for investors who want a stable, long-term destination for funds that would otherwise be hit with major tax penalties. For Investor A, eliminating the tax obligation on his property sale is as simple as “donating” the real estate to a charitable remainder trust (CRT) established by the TWFIF. Donating the asset simply transfers your basis in the property to the trust in a tax-free transaction.

Once the property is in the CRT, the owner arranges the sale of his property as normal, and the sale is completely tax free since the CRT is a non-taxable entity.



NOTE: In this example, the property must be in the CRT before it is listed for sale and/or before signing a listing agreement. If Investor A makes any indication that he is looking to sell the property before it has been transferred to the CRT, the property would no longer be eligible for this tax elimination strategy.

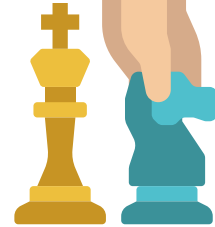
As long as the funds remain in the Tactical Wealth-administered CRT, Investor A will withdraw monthly payments for his and his spouse's entire lives. The investment in TWFIF earns interest that the CRT will use to payout the owner throughout their lifetime. At that point, the CRT assets go directly to the beneficiaries selected when the CRT was formed (often a charity or family fund).

**INVESTOR A**

Here's a summary of the process for Investor A:

1**CRT SETUP.**

Tactical Wealth creates a custom financial structure designed to hold the full value from the sale of **Investor A's** investment property.

**2****PROPERTY DONATION.**

Investor A donates the investment property to a Tactical Wealth-created charitable remainder trust, administered by a fund (Tactical Wealth Fixed Income Fund) that was specifically designed to facilitate the structuring of CRTs.

3**LIQUIDATION.**

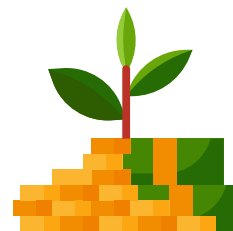
Investor A works with a realtor to list and sell the property. The tax-free proceeds from the sale (\$1.6 million) remain in the CRT for a designated period of time.

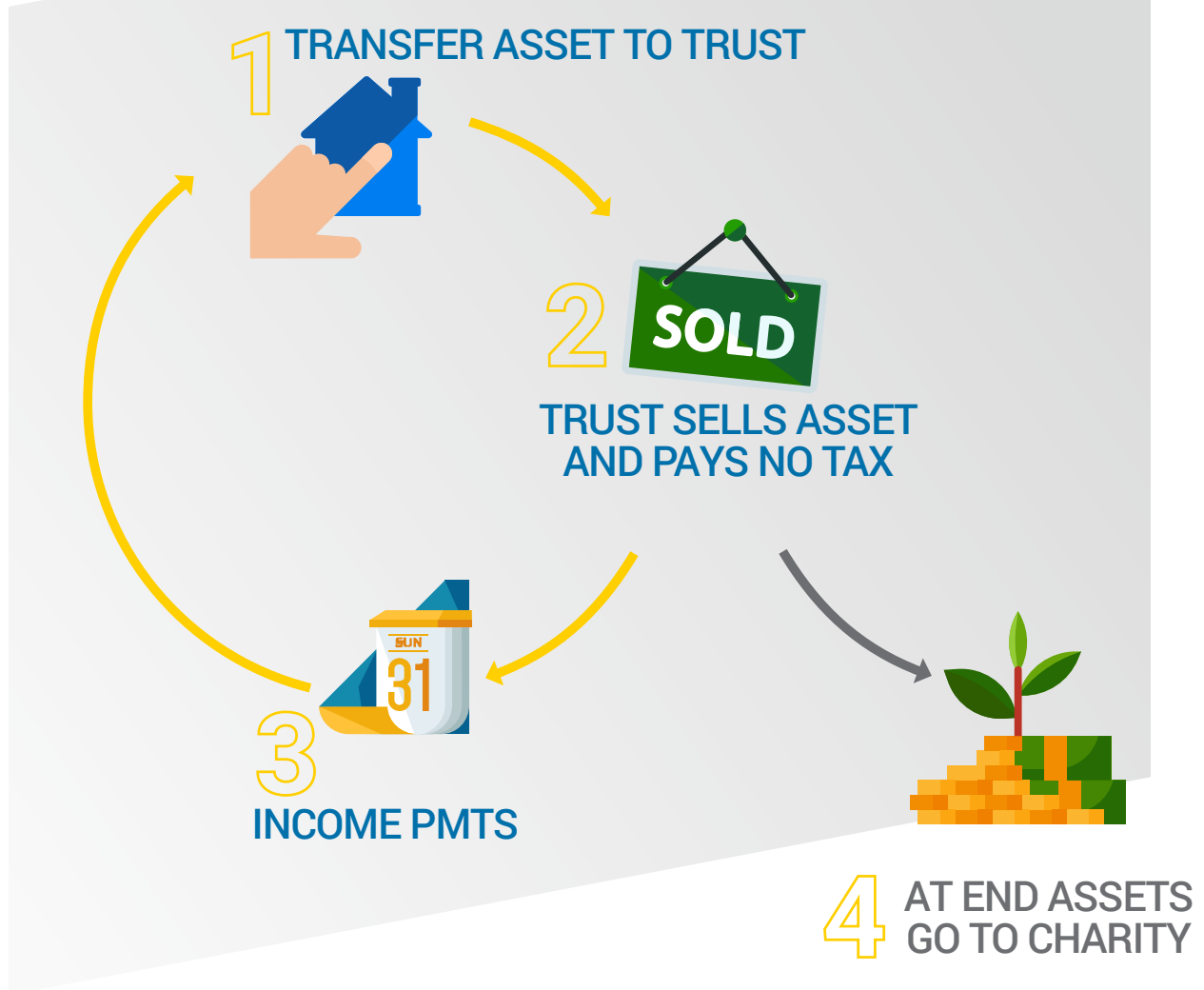
**4****MONTHLY PAYMENTS.**

Investor A receives monthly payments — structured as part of the CRT setup — throughout the lifetime of the owners, similar to an annuity.

5**FINANCIAL LEGACY.**

Using Tactical Wealth financial strategies, the CRT can be constructed so that remaining funds and interest are directed to a selected charity or family foundation beneficiaries when the trust expires.



**INVESTOR A**

- 1.** Donate property to Trust. Donating transfers basis with no tax impact and generates deduction against other income.
- 2.** As a non-taxable entity, the Trust sells property and pays no tax.
- 3.** Use the sale proceeds to invest and generate income. Trust pays you the income earned for Life.
- 4.** At end of term, some residual value goes to a charity.

With a Tactical Wealth strategy, Investor A gets:

Completely tax-free proceeds from the sale of assets

Monthly income for both spouses entire lives

An investment that generates stable consistent interest income paid out monthly

A lasting financial legacy with beneficiaries of their choice

An opportunity to keep more of his investment within his family through an irrevocable life insurance trust (ILIT) and/or family foundation





Comparison of Property Sale Profits With and Without a CRT- Year One

	No CRT	With CRT
Gross Sale Proceeds	\$1,600,000	\$1,600,000
Taxes (Includes Long-Term Capital Gains @ 20%, Depreciation Recapture @ 25%, Net Investment Income Tax @ 3.8%, and CA State Tax @ 13.3%)	\$605,600 (37.85%)	Completely Tax-free
Net Proceeds	\$994,400	\$1,600,000
Annual Income (From Net Proceeds Invested @ 5%)	\$49,720	\$80,000
Charitable Deduction	\$0	(\$80,000)
Income Tax (On Investment Income @ 25%)	(\$12,430)	Completely Tax-free
Net Annual Disposable Income	\$37,290	\$80,000

Savings and Earnings Over Time


Taxes Saved Year 1	\$605,600
Annual Taxes Saved Year 1-10 (cumulative)	\$124,300
Increased Income over 30 Years	\$1,281,300

TOTAL CRT BENEFIT EXCEEDS \$2,011,200

**Income increase reflects 5.75% annual return from TWIF on additional income from taxes saved on sale, annual taxes saved years 1-10 from charitable deduction, and additional capital on sale

INVESTOR B:

Investment Property with an Outstanding Loan



Let's assume that, like the investor in the first example, Investor B is looking to sell a rental property with an anticipated sale price of \$1.6 million, net of sales fees. Like our first investor, Investor B also purchased a property for \$1,000,000. **The only difference is that Investor B financed the purchase instead of paying cash; she still owes \$702,000 on the property.**

**INVESTOR B**

Because Investor B wisely chose to reduce her capital exposure by taking out debt, she will receive a greater return on investment given the same sales price as Investor A. All taxes will be the same on Investor B sale, resulting in \$605,600 of tax; the difference is that the investment asset cannot be moved into a charitable remainder trust because there is debt on the property.

CRTs Require Assets to Be Unencumbered when Transferred to the Trust — Meaning No Debt or Lien on Property. Most sellers have a mortgage on their property and do not qualify for CRT Strategy.

We specifically designed our fund to solve this problem.

**INVESTOR B**

How **Tactical Wealth** Can Help Investor B: Reversing the Debt on a Leveraged Property

The outstanding loan on Investor B's portfolio presents a more challenging situation. Unfortunately, leveraged assets usually can't be transferred to a CRT, like in our simple strategy for Investor A. The debt on the property may trigger the IRS to disqualify the CRT — and impose a disastrous 100 percent penalty tax.

Luckily for Investor B, however, she did have another important financial asset: an IRA worth \$1 million. She could use that to payoff the loan and qualify for the CRT, but withdrawing from the IRA will trigger income taxes and negate the tax savings of the CRT.

Using our TWFIF — an investment vehicle secured by real estate — our team can help owners like Investor B avoid a heavy tax penalty, pay off her loan, and take advantage of a secure way to invest her retirement funds. In this case, our team can create a tax-advantaged structure by lending Investor B the money to pay off her property loan. In exchange, Investor B simply transfers the



**INVESTOR B**

value of her IRA or 401K over to our TWIFIF. Moving the IRA investment to our fund is considered another investment and not an IRA distribution, thus avoiding income tax on the distribution and preserving the entire tax savings of the CRT strategy.

By transferring her 401K or IRA to us, Investor B secures a personal loan that we will issue to pay off the balance of the outstanding loan on the investment property. Once that's paid, we can create the same CRT structure we used to help maximize the value of Investor A's sale. It works exactly the same way, with tax-free monthly payments and a designated beneficiary who receives the remainder at the end of the trust terms. The only difference is that Investor B needs a second asset to transfer into the fixed income fund.



**INVESTOR B**

Worried About Accessing Your IRA or 401K?

For many investors approaching retirement, touching their 401K or IRA in any way can be a worrying idea. Here's how our strategy for Investor B helps protect her valuable retirement savings.

First, since Investor B is investing the balance of her retirement account with us instead of taking a distribution, there's no tax penalty for early withdrawal nor any additional income tax. By shifting her IRA or 401k from one investment to the TWFIF, Investor B would avoid \$498,000 in taxes on an IRA distribution — an immediate 50 percent return on her \$1 million investment in our fund. What's more, the TWFIF is a perfect alternative investment for retirement accounts as the TWFIF can provide predictable, stable monthly income that's protected from market instability.

The TWFIF is an investment vehicle with mechanics similar to an annuity, without the risks, complications, and fees. When you invest a lump sum into the fund — in this case, the value of an IRA — you place it into a long-term investment secured by our real estate holdings. In exchange for your investment, we send you monthly payments for as long as you are invested in the fund.

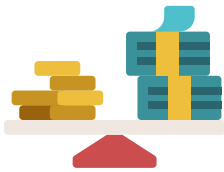
Your investment generates interest income without sales fees, riders, or any other complexities. We can customize your investment with terms and monthly payment amounts that match your exact needs. We even allow you to reinvest or delay payments, allowing interest to accrue and increasing your future payout.

**INVESTOR B**

To recap, here's a short summary of the process for Investor B:

1**SECOND ASSET CONVERSION**

The investor moves funds from any account to a personalized Tactical Wealth Fixed Income Fund account.

**2****LOAN REPAYMENT**

Tactical Wealth issues a personal loan that the investor uses to pay off her property loan to qualify for the CRT strategy.

3**PROPERTY DONATION**

The owner donates her now-paid-off investment property to a Tactical Wealth-created charitable remainder trust, administered by a fund (Tactical Wealth Fixed Income Fund) that was specially designed to facilitate the structuring of CRTs.

**4****SALE**

Investor B works with a realtor to arrange the sale of the property.

5**MONTHLY PAYMENTS**

The owner receives monthly payments — structured as part of the CRT setup throughout the lifetime of the owners, similar to an annuity.

6**FINANCIAL LEGACY**

Using Tactical Wealth financial strategies, the CRT can be constructed so that remaining funds and interest are directed to a selected charity or family foundation beneficiaries when the trust expires.



With a Tactical Wealth strategy, Investor B gets:

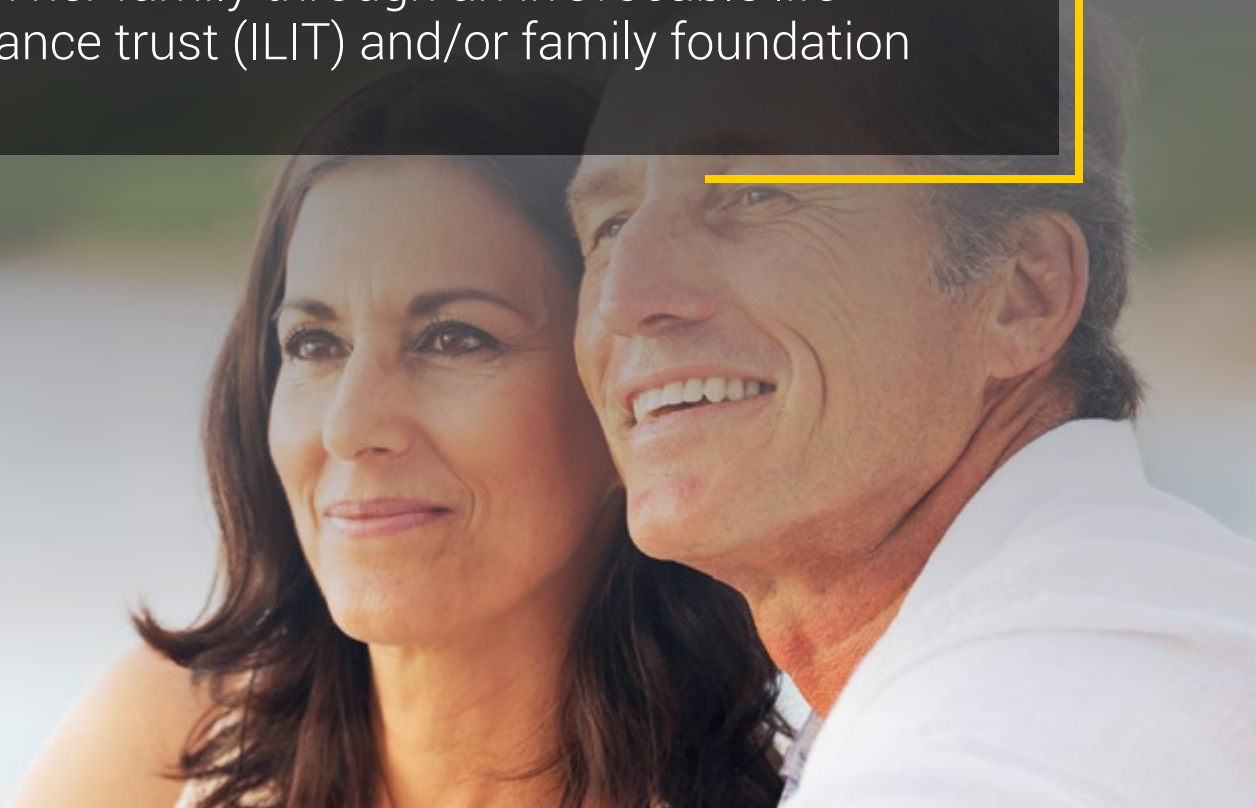
Completely tax-free proceeds from the sale of assets

Monthly income for herself and her spouse for their entire lives

An investment that generates stable consistent interest income paid out monthly

A lasting financial legacy with beneficiaries of their choice

An opportunity to keep more of her investment within her family through an irrevocable life insurance trust (ILIT) and/or family foundation





Selling a Business

In addition to helping owners maximize their after-tax cash proceeds on tangible properties, we can also use our tax strategies for owners who are selling intangible assets: especially business owners who are looking to cash out their equity.

These owners often have considerable value built up in their core business, inventory, Intellectual Property, equipment, office space, or other assets that support the valuation of their company — and that any owner will want to convert to the biggest profit possible when they sell. Unfortunately, when it comes to the IRS, a business is a capital asset just like an investment property, and it will get hit with a similarly painful level of capital gains tax unless the owner takes advantage of a smart tax mitigation strategy.

At Tactical Wealth, we use a similar CRT-based approach to help proprietors and business owners sell their companies and





real estate example, we can help owners with unleveraged businesses maximize the cash value by eliminating taxes simply by structuring the sale within a CRT administered by Tactical Wealth. And similar to how we help Investor B, we can even help minimize taxes and maximize sale value for business owners with outstanding loan balances on their books.

How? Business sales can be structured as either an asset sale or equity sale, each with different tax implications. Depending on the way the business is taxed, an owner can maximize the cash they get to keep from the sale by either donating assets or equity to our Tactical Wealth administered CRT structure and then selling it. The CRT is a non-taxable entity, so you'll pay no tax on the sale after its in our CRT. There are some unique challenges for businesses though. For example, since an S-Corp can only be owned by natural persons and not other entities like trusts, there are some extra steps to qualify for the huge tax savings offered by our CRT strategy. We will analyze your unique situation and help you navigate to the most beneficial structure so you keep all of your sale proceeds.





If you're preparing to sell a business, contact our Tactical Wealth advisors before you decide how much of the valuation you're going to give up to capital gains tax. We're here to help proprietors and business owners preserve the value of their company's sale and reduce capital gains taxes on the proceeds — ultimately allowing these owners to keep more of their wealth.

Selling Another Major Asset

This financial strategy doesn't apply just to the sale of real estate assets or a business. Any kind of asset that has appreciated in value can be converted into a CRT administered by Tactical Wealth to avoid taxes.

If you're about to trigger a major capital gain — whether it's from the sale of a property, business, piece of art, or any other highly appreciated asset — we can create a structure that allows you to avoid a major tax penalty. At the same time, we'll make sure that your money provides a lifetime of income for you and your spouse.





More Benefits of Working with Tactical Wealth

Custom Tax-Advantaged Solutions

We understand that everyone has his or her own needs, priorities, and unique situation. The versatility of our strategies allows us to tailor solutions to your precise requirements. We can leverage our real estate investment-backed fixed income fund to build tax-advantaged structures that will allow you to maximize cash proceeds from the sale of your assets and turn them into a lasting financial legacy — for your retirement, your spouse, or your heirs.



Whatever your financial or investment goals, we can tailor our solutions — be it through a CRT or other trust, our TWFIF, or both — to match your individual needs. We allow you to choose the length of the terms, whether your fund or trust matures in five years, twenty, or lifetime. And we can help you build a structure that will allow you to receive monthly payments from your proceeds long into the future.

Securing your wealth for your family

For many clients we serve, their children are often a primary focus of their financial strategy. We're able to offer these clients several different customizable financial structures designed to help them preserve their wealth and pass it on to the next generation of their family:

An irrevocable life insurance trust (ILIT):

An ILIT is a trust with a life insurance policy as its primary asset (unlike an investment property with a CRT). By working with Tactical Wealth to structure a CRT in combination with an ILIT, you can protect the full value of your asset from taxes on the sale of the asset all the way through today's estate tax of up to 50 percent — ensuring that the beneficiaries you select receive all the value of the assets you have accumulated through life.

A family foundation:

These family-owned private charities are a common charitable structure with trustees who are entrusted with the management of the funds in the investment — which can be provided by the tax-protected sale of a major asset. When children or family are properly designated as trustees of a family foundation, it can provide those loved ones with a reasonable salary supported by the value of the assets in the family foundation providing a lifetime income stream for them as well.



Secure, Stable Investments

Our funds are backed by our real estate investments — mortgages with low loan-to-value (LTV) ratios in favorable areas. We screen each home carefully, choosing only those with a maximum LTV of 70 percent. Most mortgages we purchase have LTV ratios that are even lower than that: in fact, our current portfolio LTV is below 60%.

We also built our fund to have a solid balance sheet. Every \$100 of investments is backed by over \$150 in real estate. These secure investments give us the stable capital needed to issue loans and administer secure, advantageous trusts.



Zero Fees

Unlike other tax strategies and investment funds, we charge zero fees. That means no administrative charges, no sales fees, and no hidden fees buried within your contract. With our custom solutions, your asset is your collateral. Because of this, we are able to offer loans, investment funds, and trusts with zero setup and sales fees. We can setup the CRT, perform the annual filing requirements, issue monthly payments to you, and invest the assets all with zero fees.





Debt Alleviation

Selling a major asset with a debt attached to it virtually guarantees that the maximum amount of taxes will be levied on sales profits.. Investing in our fund is the only investment strategy that can help you avoid heavily reduced profits by ensuring that outstanding loans are paid off before you plan to resell.

Then, by donating your property to a Tactical Wealth-created CRT, we allow you to reap the benefits of an unencumbered property sale, while sidestepping a heavy tax burden and earning income for yourself and your family for the rest of your life.

Steady Monthly Income

Not everyone looking to sell a major asset is looking for stable household income. However, if you are planning to retire or cashout in the not-too-distant future, investing in a fund or charitable trust administered by Tactical Wealth can prepare you for post-career life.

We can set up your fund or trust in such a way that you delay payments until you need them, whether that's ten or twenty years down the line. Your earnings will compound and increase your payouts substantially when you do start to take monthly payments. Then you have a steady source of reliable income to help you maintain your lifestyle into retirement.

And if you're not waiting until retirement to use your funds? You can begin receiving payments right away, without any penalties for doing so. This makes our solutions especially advantageous for those hoping to live off the proceeds from the sale of major assets.



Charitable Donation

Placing your assets in our CRT helps you do more than simply avoid capital gains taxes. It also gives you control over how you invest in your community and the world at large. We allow you to select the nonprofit that supports the causes you care about. Additionally, placing your money in a CRT provides another benefit on your taxes: a charitable deduction that you can take to offset any other taxable income you receive. As you can see on our example table, the deduction offsets your taxable income where you can pay zero taxes for years into the future.

Comparison of Property Sale Profits With and Without a CRT- Year One

	No CRT	With CRT
Net Proceeds	\$994,400	\$1,600,000
Annual Income (From Net Proceeds Invested @ 5%)	\$49,720	\$80,000
Charitable Deduction	\$0	(\$80,000)
Income Tax (On Investment Income @ 25%)	(\$12,430)	Completely Tax-free
Net Annual Disposable Income	\$37,290	\$80,000



A Lasting Family Legacy

All parents want to feel that their children's future is secure. Tactical Wealth can help you preserve more of your wealth to pass on to your children and other beneficiaries. Through our family foundation and ILIT strategies, we can ensure that your children receive regular income and inherit a lasting legacy they can give to their children and their children's children.



Are Our Investment Solutions Right for You?

We know that, as a seasoned investor, you want to do your due diligence before you take on any new investment or tax strategy. These are highly valuable assets, after all. In fact, if you're selling a business or rental property, that asset represents not just financial value but all the years of hard work you've put in to cultivate it.

Because of this, we recommend that all investors review their options carefully before considering our products. That's why we've created the following checklist that you can use to gauge whether working with Tactical Wealth is the right move for you.





Are you:

Planning to sell a major asset, like a business, property, or other appreciated asset?

Our customized asset solutions work best for individuals who are planning to sell something of highly appreciated value, whether it is a business, a real estate investment, or a valuable object like a work of art. Specifically, our solutions are designed for individuals who are selling assets that are valuable enough to trigger the highest capital gains tax rates. These asset holders stand to earn the most value from our fund.

Hoping to avoid capital gains taxes?

Avoiding high tax penalties on capital gains is the number-one reason to trust the sale of your assets to Tactical Wealth. By placing your proceeds in a custom CRT, you ensure that you maximize cash proceeds. In this way, you can avoid the hefty capital gains, net investment income, and depreciation recapture taxes that stand to significantly reduce the cash proceeds from your sale. You reap the true value of your assets.





Trying to sell a leveraged property?

Our fund is ideal for any investment property owner, but it's an especially smart choice for those looking to sell a leveraged asset, such as a rental property with an outstanding loan. Because Tactical Wealth is able to function as a loan provider, we can help you dissolve outstanding loan balances, allowing you to sell your property at its full value.

Instead of simply taking the money for that loan out of your proceeds, we have a number of options, including the use of funds from your brokerage account, IRA or 401K, to secure your loan. Not only do you get the money to pay off your loan, you also get the benefit of placing your retirement savings into our secure fixed income fund.



Trying to ensure that tax-free proceeds still go to a good place?

At the end of the day, we all hope that we can do something to help make the world a better place. Setting up a charitable trust with Tactical Wealth allows you to do just that, by guaranteeing a generous donation to the organization of your choice after you are done using it to benefit you and your family. We give you full control over how your money is used by allowing you to select the nonprofit you want to benefit, even if that is your own family foundation.



Get Prepared to Secure Your Assets

Intrigued by the thought of preserving more of your wealth? You'll want to make sure you take the following actions — before you list your assets for sale or have their value appraised:

Don't just take our word for it

We encourage you to discuss our tax and investment strategies with your CPA, legal counsel, or other trusted financial advisors before you decide if our fund is right for you. Our extensive, rigorous due diligence document is available for review if your financial team needs visibility into our approach. We welcome the opportunity to discuss it with them. Once they understand the strategy and see it mapped directly to the IRS regulations that support it, they can only validate our strategy for you.





Reach out to Tactical Wealth first

If your CPA gives you the all-clear and you think our solutions may be for you, it's imperative that you discuss your options before you make any moves to sell your asset. If you've contacted a realtor or agent to list a property before the trust is created, the tax-advantaged structures we've just described can't be applied. And the tax penalty for doing so can be quite severe: the government may claim up to 100 percent of the proceeds of a disqualified CRT. That's why it's important you get in touch early so we can ensure that you and your team understand the sequence required for the strategy success.

Let us help you appraise and sell your assets

At Tactical Wealth, we've worked with many appraisers, brokers, agents, and realtors to sell donated properties and assets. We can recommend appraisers who have experience evaluating properties within charitable trusts for more beneficial values. An appraisal to support a value to be used as a donation is very different than a traditional appraisal used to support a sale value. And if necessary, we can recommend trusted realtors and brokers who have experience with the process and will help you through each step.



Thank You for Reading

We hope this ebook has helped you understand your different options for maximizing the sale of your assets. Specifically, we hope you now understand why trusting Tactical Wealth is the ideal way to avoid capital gains and other taxes while placing your money into a secure tax-advantaged vehicle.

If you would like to learn more about Tactical Wealth, please visit our website for more information or contact us if you're ready to speak to a representative today.



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