



Tax Track — Consult Packet

Family Name | Date

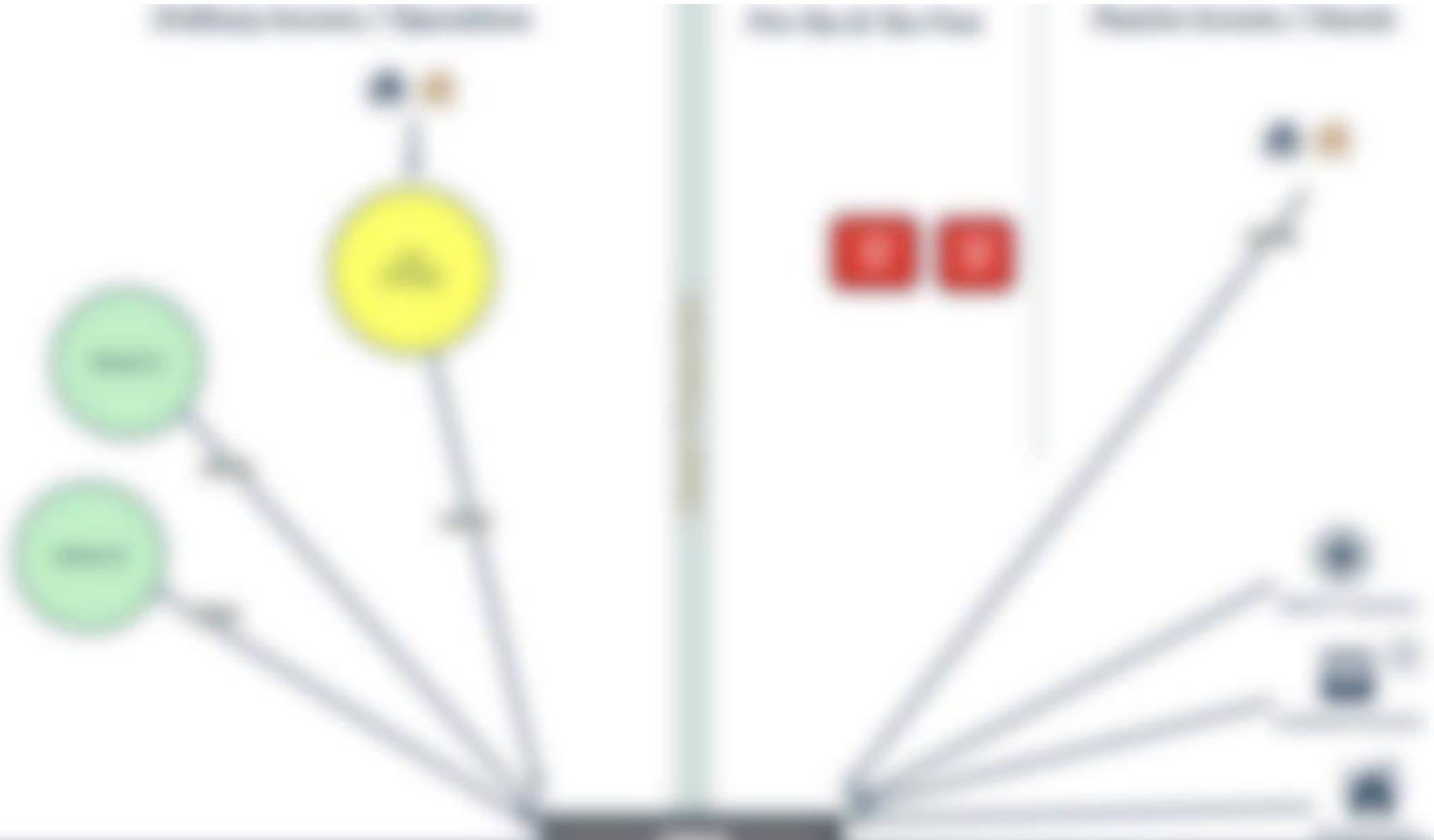
Thank you for choosing our team to explore potential tax-saving opportunities and wealth-building strategies tailored to your needs. We've partnered with a trusted professional tax firm to conduct a deeper review of your current structure and outline a proposed optimized approach. Enclosed you will find:

- Current Asset Map: an illustration of your current tax and wealth configurations.
- Proposed Asset Map: an illustration of the proposed, optimized tax and wealth strategies.
- Implementation Guide: summary of the implementation recommendation provided in the Proposed Asset Map.

Sincerely,
Asset Strategy

OPERATIONS

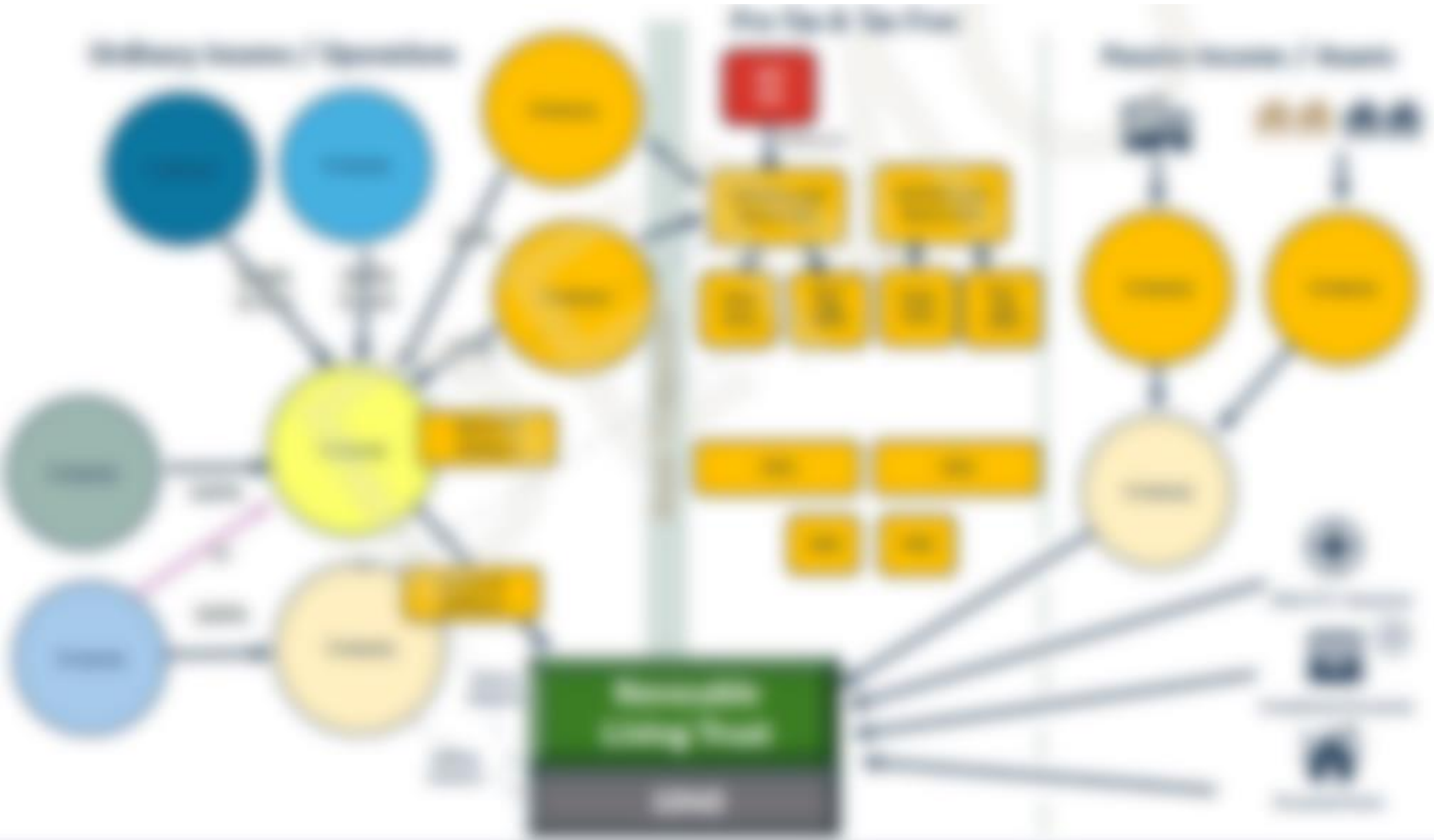
ASSETS



= New

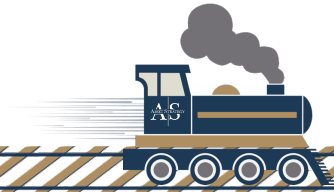
= Consider

Proposed Asset Map



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Helping You Create, Manage, Protect, & Distribute Wealth®



Year

Wealth

- | | | | | | | | |
|--|-----|-----|-----|-----|-----|-----|-----|
| ✓ Outline of what the wealth team will potentially complete. | ✓ 1 | ✓ 2 | ✓ 3 | ✓ 4 | ✓ 5 | ✓ 6 | ✓ 7 |
|--|-----|-----|-----|-----|-----|-----|-----|

Tax

- | | | | | | | | |
|---|-----|-----|-----|-----|-----|-----|-----|
| ✓ Outline of what the tax team will potentially complete. | ✓ 1 | ✓ 2 | ✓ 3 | ✓ 4 | ✓ 5 | ✓ 6 | ✓ 7 |
|---|-----|-----|-----|-----|-----|-----|-----|

Legal

- | | | | | | | | |
|---|-----|-----|-----|-----|-----|-----|-----|
| ✓ Outline of what the legal team will potentially complete. | ✓ 1 | ✓ 2 | ✓ 3 | ✓ 4 | ✓ 5 | ✓ 6 | ✓ 7 |
|---|-----|-----|-----|-----|-----|-----|-----|

ASSET STRATEGY

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Wealth



Name
Title
Email
Phone



Name
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Email
Phone



Name
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Email
Phone

Tax



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Email
Phone

Legal



Name
Title
Email
Phone



Wealth Implementation Guide

Below is the list of proposed strategies and implementation instructions.
You should engage a qualified professional to help you implement these strategies.

Establish a Solo 401k plan with LLC

Perform a Backdoor Roth



Tax Implementation Guide

Below is the list of proposed strategies and implementation instructions.
You should engage a qualified professional to help you implement these strategies.

Begin receiving income directly into LLC

Consider performing a Cost Segregation on your investment properties



Legal Implementation Guide

Below is the list of proposed strategies and implementation instructions.
You should engage a qualified professional to help you implement these strategies.

Establish a Limited Liability Company (LLC) for each investment property

Establish a Board of Directors



Tax Return Review

The following is a list of corrections or items to note based on a review of your prior returns.

Personal Tax Return

DEMO

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Disclosures

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