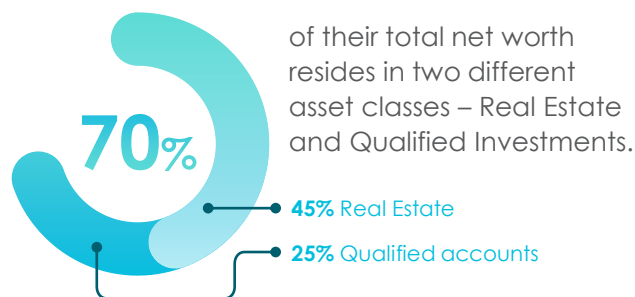


Creating an “Outside of the Box” Real Estate Planned Gift

Why the time for Real Estate Gifts is now:

The largest transfer of wealth is underway in our nation. The “Silver Tsunami” has begun and Baby Boomers, the wealthiest generation in the U.S., is set to transfer trillions of dollars of assets to their beneficiaries.

When looking at their total net worth, on average



The problem for many Baby Boomers with these assets is that their real estate investments may have a very low Cost Basis, large gains, require a lot of maintenance and upkeep, is fully depreciated and providing little tax benefits, but come with large tax bills if sold.

But Baby Boomers are in need of more complex planning. Living longer, increasing Income Tax Rates, making the most of their retirement, helping their children and grandchildren, and planning on how to transfer assets to their beneficiaries while keeping their family together, are just some of the challenges facing this generation.

Providing these unique “Heroes” with a customized solution to make the most of their real estate investments, qualified retirement accounts, and being philanthropic – could actually address many, if not all of their concerns. So how can you guide your “Hero”?

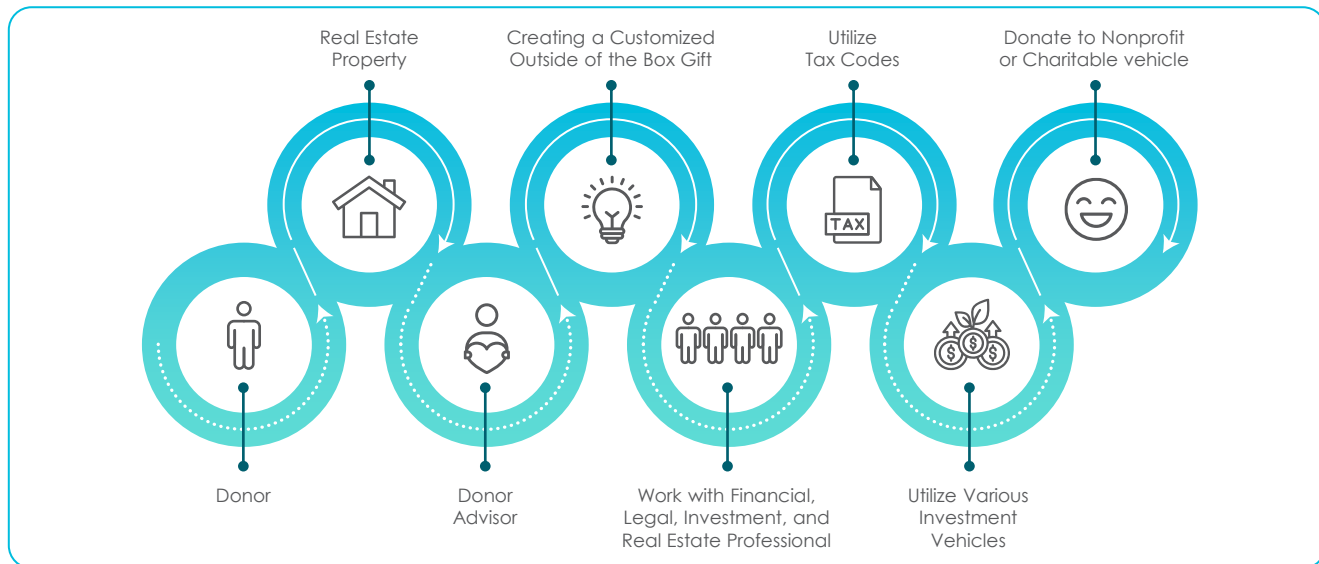
Drawbacks of Real Estate Gifts:

- Mortgages create complicated Real Estate Gifts.
- Donor has to donate Cost Basis + Capital Gain.
- Larger gifts may not allow the donor to maximize their Income Tax Deduction.
- Simply making a real estate gift may not address other Family, Financial, Retirement, Estate, Tax, and Long-Term Care Planning goals.

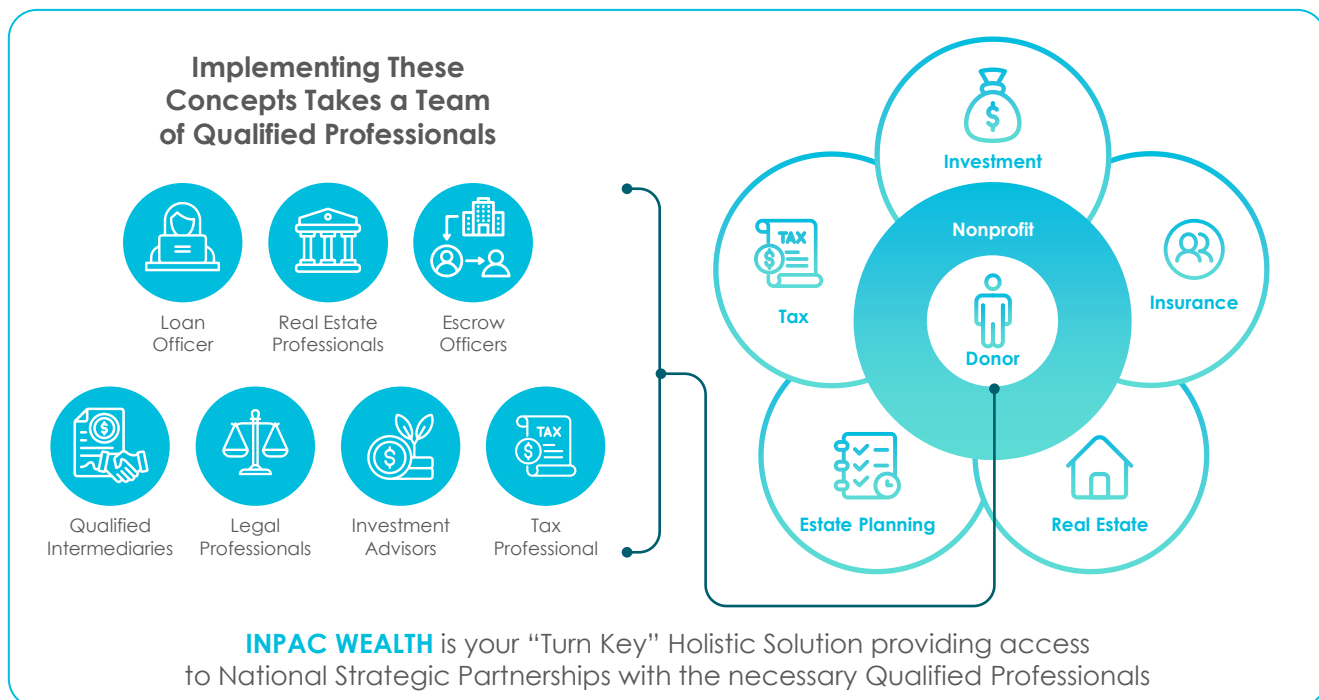
Benefits of an “Outside of the Box” Real Estate Gift:

- Allows donor to turn properties with mortgages into a potential gift.
- Provides the donor the ability to access tax-free cash from real estate prior to making the gift.
- Donor can make flexible partial gifts over time to maximize their income tax deductions.
- Donor can diversify their real estate holdings into various investment choices like stocks & bonds.
- Can create a powerful strategy to address: Retirement, Estate Planning, Long-Term Care, Family, and Asset Transfer Planning Needs.

Creating an “Outside of the Box” Real Estate Gift:



People Needed to Create an “Outside of the Box” Real Estate Gift:



Important Disclosures:

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Troy Wada

