9

YOUR EXPERT GUIDE TO
CAP GAINS TAX DEFERRAL

SELL YOUR REAL ESTATE OR BUSINESS SMARTER

OR OTHER HIGHLY APPRECIATED ASSET

IN 9 STEPS

CAPITAL GAINS TAX SOLUTIONS

DEFERRED SALES TRUST

CAPITALGAINSTAXSOLUTIONS.COM

As a high net worth individual, you know that every major business decision demands careful thought and preparation.

What bigger decision is there when choosing to sell your highly appreciated asset than how to defer your largest expense, Capital Gains Tax & Depreciation Recapture?

There's a lot to consider and a number of steps to navigate to make sure you don't sacrifice 30-50% of your gain to the IRS.

The Deferred Sales Trust has helped owners defer capital gains taxes when they sell their businesses, primary homes, investment real estate and other highly appreciated assets since 1996. We've designed this in-depth guide to walk you through each of the nine key steps involved – with tips and insights to help you manage the entire process, safeguard your wealth, avoid uncertainty and get the best return on your investment.

Avoiding the pitfalls

You know your business or real estate inside out. But you may not have sold a company or real estate before using a deferred sales trust. It's important to understand the process before you begin to avoid the common pitfalls that can seriously undermine the tax deferral (and your sanity).

Maintaining confidentiality

Confidentiality is critical to maintaining ongoing positive relationships with our clients and strategic partners. We value your information and never share it with anyone.

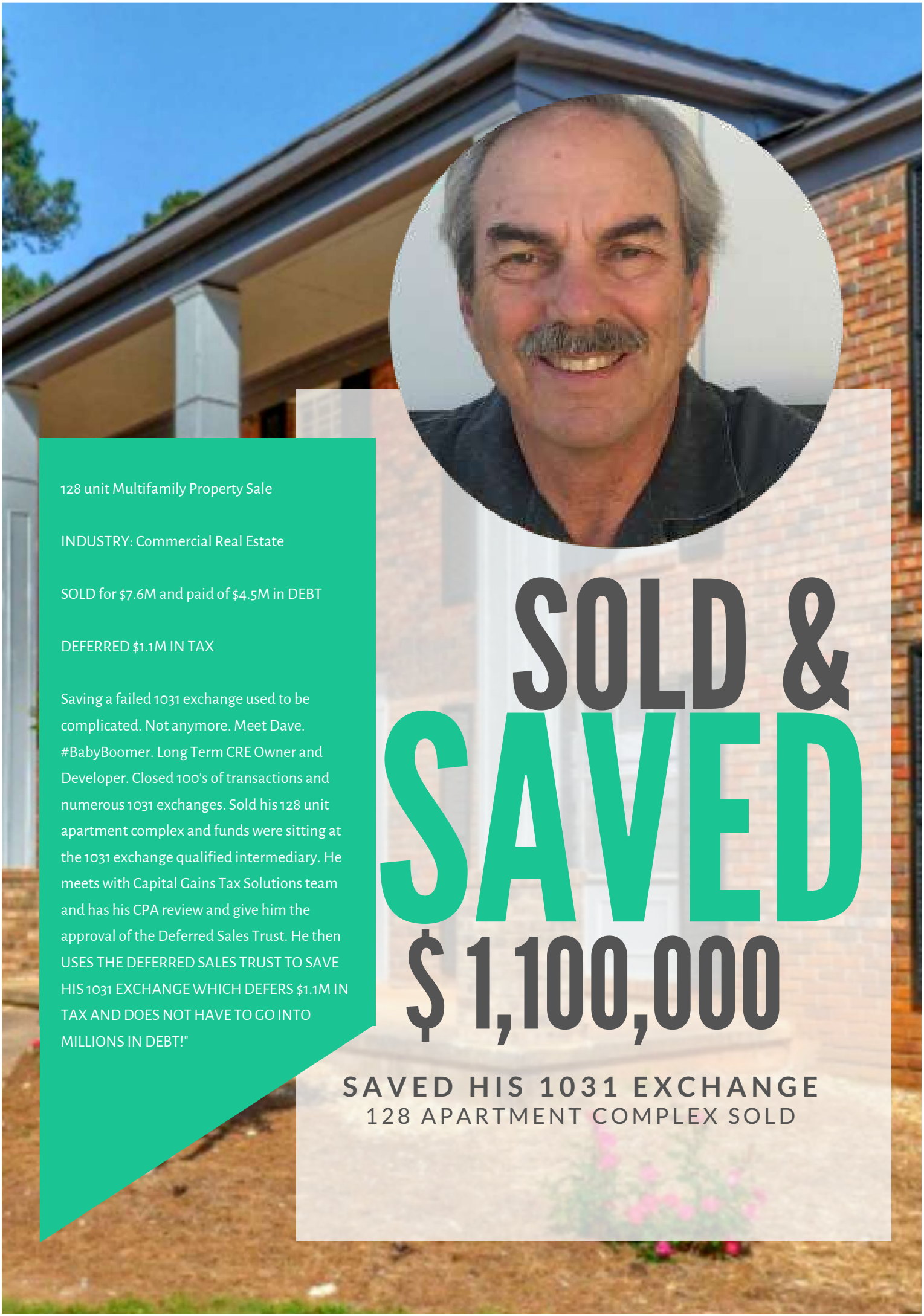
Business as usual

Trying to defer tax yourself or with an unproven professional or strategy could potentially cause the tax to be triggered and a reduction in your wealth.Work with the best. The Deferred Sales Trust has a long standing track record and zero issues with the IRS.

Engaging our company and the deferred sales trust exclusive tax attorney will free up your time to focus on running your real estate or business to maximize its performance and potential value. Many accountants and lawyers may have never heard of the deferred sales trust and that is ok. We want to bring them in and educate them so you both feel comfortable with us and the deferred sales trust. We prefer to deal with you and your trusted adviors and gain their blessing. We do this through clear communication as well as including them in the journey to closing your deferred sales trust.

Go it alone, or get help?

Today, selling real estate, a business or other highly appreciated assets can be a complex transaction subject to many legal and financial conditions. Meanwhile, tax law environment is increasingly complex and your sensitive deal needs to be carefully protected. Taking the less than ideal team approach to deferring your tax can lead to uncertainty, delays and poor tax deferral outcomes.



128 unit Multifamily Property Sale

INDUSTRY: Commercial Real Estate

SOLD for $7.6M and paid of $4.5M in DEBT

DEFERRED $1.1M IN TAX

Saving a failed 1031 exchange used to be complicated. Not anymore. Meet Dave. #BabyBoomer. Long Term CRE Owner and Developer. Closed 100's of transactions and numerous 1031 exchanges. Sold his 128 unit apartment complex and funds were sitting at the 1031 exchange qualified intermediary. He meets with Capital Gains Tax Solutions team and has his CPA review and give him the approval of the Deferred Sales Trust. He then USES THE DEFERRED SALES TRUST TO SAVE HIS 1031 EXCHANGE WHICH DEFERS $1.1M IN TAX AND DOES NOT HAVE TO GO INTO MILLIONS IN DEBT!"

SOLD & SAVED $ 1,100,000

SAVED HIS 1031 EXCHANGE

128 APARTMENT COMPLEX SOLD

We offer the best option to defer tax on the sale of your real estate or business. Our experienced team of Tax Attorneys, Financial Advisors and CPA's guide you through our proven **nine key steps.**

1

Planning

Preparing to sell your real estate, business or other highly appreciated asset by maximizing its efficiency, earning potential, structure, and presentation really pays off. But it is not the only thing that matters.

For example, deferring the 30-50% in tax liability costs and increasing your income by as little as $500,000 could add millions in wealth over time. We can help you defer your tax and live off of the interest for as long as you want.

2

Envision & Create Your Wealth Plan

Naturally, you want the maximum price for the sale of your asset and defer the tax. But selling and deferring the tax is just the first step. You want to map out a wealth plan that fits your financial needs and wants. How much time and energy do you want to spend managing your wealth? How active do you want to be in buying a new real estate deal? What is your risk tolerance and how does this change the allocation of investments? Maybe you need to use a combination of a few tax deferral strategies to provide you with the outcome you are looking for. The clearer you articulate your ideal vision, the more accurate and appropriate tools and strategies we can recommend.

3

Deal Specifics

Provide a comprehensive document that gives a detailed overview of the key figures for your asset sale.

Using accurate numbers is crucial to determine your tax liability. Please provide the cost basis, debt on asset, projected sales price, depreciation taken over the years. How is the asset held? LLC, S-Corp, C-Corp, Individual or Partnership?

Go to https://capitalgainstaxsolutions.com/calculate/ to submit your details.

4

Conference call with all parties to discuss the Deferred Sales Trust

Let's talk about the deferred sales trust, your asset your selling and answer any questions you may have.

Bring on your Attorney, CPA or other trusted advisors to give their blessing of us and the DST strategy. Ready to move forward? Request a conditional engagement agreement which starts the process for the DST attorney to draft your trust. This agreement is 100% conditional on your transaction closing and your choice to use the DST. Zero is owed to anyone unless and if you use the DST.

5

Connecting the Deal with your Deferred Sales Trust

After you sign the conditional engagement agreement please connect us with the escrow officer, Business or Real Estate Broker, M&A attorney or anyone else helping you with the sale of your transaction.

There is specific legal language we need to add to the purchase and sale agreement. We also have a large database of active brokers we can connect you with should you need guidance on the best broker to hire. If you don't yet have an escrow company, 1031 qualified intermediary or broker, let us know and we can help.

6

Planning

Connect with Financial Advisor to map out the risk tolerance, investments and cash flow payments you would like to receive from the DST.

Preparing at this step really pays off to maximizing the equity in the DST once it's closed. For example, most of the notes target rate is 8% over any given 10 year period of time and clients live off the interest of 5-6% to give a gap between interest and principal. ***note: this is entirely up to you.**

7

Prepare to close

High level of communication between all parties. 7-30 days from closing. Naturally you want the closing to go as smoothly as possible.

Connect with Bank where funds will be held and understand how the funds are protected using Direct Access Control Agreement (DACA.)

8

Documentation

Sign closing documents including promissory note, Trusts documents, and assignment of interest.

Each Deferred Sales Trust is crafted to ensure it is accurate and represents your specific asset sale while adhering to numerous legal requirements and regulations.

9

Close Deal

Escrow sends funds to the bank account of the newly created Deferred Sales Trust and you receive access to view the funds online.

Investments are made based on your approval of the investment allocation and risk tolerance. The funds are protected and never move without your signature.

*we highly recommend you add the deferred sales trust to your living trust so your heirs or charity can step into your shoes and receive payments from the trust when your estate passes.

DON'T DREAM OF BETTER –
Let's make it happen.

WWW.CAPITALGAINSTAXSOLUTIONS.COM

STEP 1: Planning

PREPARING YOUR TAX PLAN FOR YOUR ASSET SALE

To maximize the proceeds from the sale, tax planning should start on day one.

That's in an ideal world. But even if you've never thought about tax planning before, there are steps you can (and should) take to set you up for success.

From calculating your basis, gathering supporting records, and clarifying your estate planning – your goal is to maximize your equity by structuring the sale of the asset to enable you to transfer the most amount of wealth so you can maximize the impact your wealth can have for yourself, your family and your legacy.

Timing it right

If you are ready to have more freedom and less stress, aim to sell when your asset is at its peak value and defer the capital gains tax and depreciation recapture using a deferred sales trust.

Are your records in order?

For some business and real estate owners, their impeccable, detailed accounts are a source of pride; for others… less so. If you fall into the latter category, now is the time to get them shipshape. This includes records relating to capital improvements, depreciation taken over the years debt, asking the bank for a payoff demand to let them know you will be paying them off. Clarifying if you have a pre-payment penalty.

Clarify your options

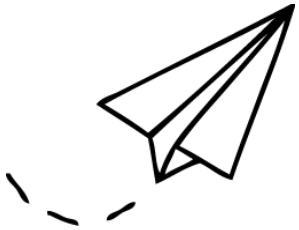
Review what options are available and which will help you achieve your goals with your wealth, lifestyle and legacy. Clearly comparing each tax deferral strategy such as a 1031 exchange, Delaware statutory trust, opportunity zone and charitable remainder trust vs a deferred sales trust can make a big difference to the outcome of your wealth. For example, a new depreciation schedule on a $10M Multifamily Complex using a deferred sales trust could reduce your net taxable income by hundreds of thousands of dollars vs just doing a traditional 1031 exchange and keeping the same basis in place.

What are you selling?

Did you know a 1031 exchange only works for investment property? A deferred sales trust works with just about any other highly appreciated asset such as a high end primary home, business, investment real estate and other highly appreciated assets. Making sure your're using a tax strategy which is allowed for the asset you are selling will make all the difference for a favorable outcome.

2K+

OWNERS HAVE TRUSTED THE DST TO DEFER THEIR TAX



Selling and deferring capital gains tax to achieve a transformational wealth plan used to be complicated, not anymore

The 3 Secrets Of Optimal Timing Transformational Wealth Plan

Secret #1:

Legally Break Free From Capital Gains Tax And Find Freedom To Buy And Sell Your Business or Property Without Ever Worrying About Capital Gains Tax Or A 1031 Exchange Ever Again

Secret #2:

Clone A Proven Wealth Plan With Capital Gains Tax Solutions In Less Than 5 Hours To Unlock Optimal Timing

Secret #3:

Get Your Deferred Sales Trust To Work In Your Favor And Become An Investment Rather Than An Expense

Plan for success

When selling your asset and looking at a tax deferral strategy, it's best to have your exit plan in place before you list your asset to sell or go into contract. You will want the buyer to know your plans as soon as practical and definitely before they remove all contingencies.
Generally, we recommend you have the DST legal language in the purchase and sales agreement in the early stages of the negotiations.

Will you want some cash at closing?

No problem. Just let us know how much. *Please note whatever you receive at closing will be taxed.

Active or Passive?

Would you like to be passive and just receive income or would you rather be active and invest into more real estate or business deals on your own or with your partners?

Checklist

Financial information must be current and accurate. If you're selling halfway through the year, ask your accountant to prepare year-to-date statements. (Not all of these will apply to your business.)

- ◯ Conditional Engagement Agreement Signed
- ◯ Risk Tolerance questionnaire completed.
- ◯ Deferred Sales Trust Financial analysis
- ◯ Name of the trust? What would you like to call the trust?
- ◯ Details of any major investments you would like to invest in.
- ◯ Terms of note payments defined.
- ◯ Connect with Sunwest Bank to understand DACA.
- ◯ Living Trust in place to pass DST to heirs or charity
- ◯ Total Taxable Estate Analysis

TIP: Be early. Connect with us now and plan now before you are in escrow.

24+

YEAR TRACK-RECORD OF SUCCESS FOR THE DEFERRED SALES TRUST

STEP 2: Envision & Create Your Wealth Plan

I'M CURIOUS, FOR YOU…WHAT IS THE #1 THING IN YOUR WEALTH PLAN, BUSINESS OR REAL ESTATE THAT IS CURRENTLY HOLDING YOU BACK?

We serve high net worth individuals like yourself and have been asking these questions for the past year, and the results are very interesting to us. How about you?

4 questions to consider

1. I DON'T HAVE...
a clear multiple income stream wealth plan yet.

2. MY CURRENT ASSETS ARE NOT...
cash flowing producing assets or they take up a huge amount of my time and energy.

3. I NEED MORE ATTRACTIVE...
real estate or business to invest in or freedom of time to invest in them..

4. I HAVE HIGHLY APPRECIATED ASSETS TO...
sell and I would like to learn ways to defer capital gains tax and invest at optimal timing.

RESULTS

- Around 50% said they don't have multiple income streams.

- Around 20% said their current assets don't produce cash flow or they take up a huge amount of their time and energy .

- Around 30% said they need more viable real estate or business deals or freedom of time to invest in them.

- Not surprisingly, around 90% said they have highly appreciated assets to sell and would like to learn ways to defer capital gains tax and invest at optimal timing …

Based on these results, we've created a no-cost MASTERCLASS, that you can watch on-demand. Its called:

The 3 Secrets Of Optimal Timing Transformational Wealth Plan Masterclass

It will show you: Secret #1: Selling and Deferring 100's of thousands to Millions in Capital Gains Tax:"How to legally break free from capital gains tax and find freedom to buy and sell your business or property without ever worrying about 1031 exchange ever again"asset.

·Secret #2: Optimal Timing Transformational Wealth Plan Cloning: "How To Clone A Proven Wealth Plan With Capital Gains Tax Solutions In Less Than 5 Hours And Have More Time, Energy and Debt Freedom."

·Secret #3: My #1 Wealth Building Hack:"How To Get Your Deferred Sales Trust To Work In Your Favor And Become An Investment Rather Than An Expense"

–You need a plan of action so you can be financially and time free and transition to your ideal life post your active day to day business or real estate ownership /management.

For Example: Buying Real Estate or Funding a New Business Venture as a passive investor. We will show you have to do this all tax-deferred and in line with maximizing your wealth while decreasing your risk.

Email Brett with subject line: masterclass at brett@capitalgainstaxsolutions.com to gain free access.

DST saves Baby Boomer $380,000 in capital gains tax when she sold

LOCATION: Cupertino, CA

ASSET TYPE Primary Home

SOLD $3.1M | PAID OFF $1.1M OF DEBT|DEFERRED $380,000

A home owner wanted to sell her highly appreciated primary residence and defer the tax, or she wouldn't sell.
Our team presented the DST and, with her financial planner, created a tax deferred wealth plan which helped her escape feeling trapped by capital gains tax and her 121 exclusion not covering the additional gain on her property. Her Realtor secured a buyer and our client sold at $3.1M asking price and deferred $380K in capital gains tax using the DST.

STEP 3: Documentation

WHAT WE NEED TO KNOW

Clear written goals and vision for your wealth is a key document when formulating your tax deferred wealth plan.

What do I need to write?

Send a document that sets out all the relevant information about your financial plan and goals. This document needs to be comprehensive, accurate, and represent your needs and wants.

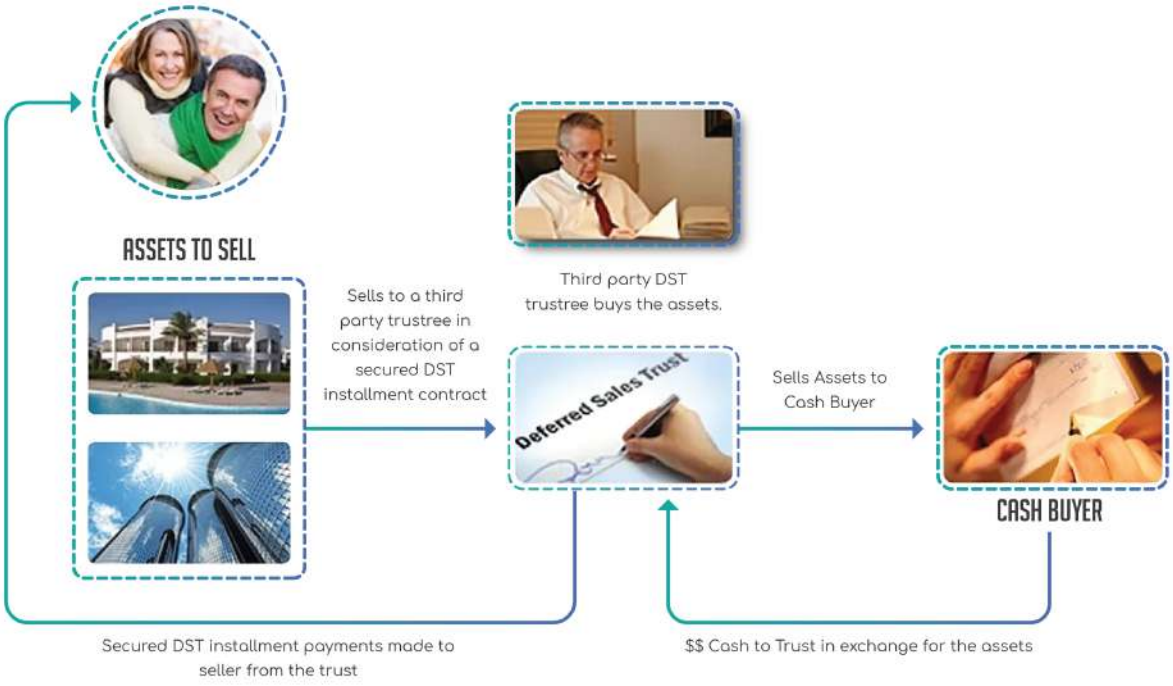
Looking for a guide? Capital Gains Tax Solutions will help you clarify your thoughts and connect you with a financial advisor who can help formulate a plan.

what we need from you...

- purchase & sale agreement
- signed DST engagement agreement
- name of trust.
- Terms of note payments.
- risk tolerance questionnaire completed.
- financial allocation approved.
- connected with escrow, attorney's or brokers helping with the sale

HOW DOES THIS WORK?

The process starts when a property owner sells their property to a trust owned by a third-party company(Capital Gains Tax Solutions). The trust sells the property or stock. Next, the trust "pays" you. The payment isn't in cash, but with payment, the contract called an "installment contract." The contract promises to make payments to you over an agreed period of time. There are zero taxes to the trust on the sale since the trust "purchased" the property from you for what it sold it for. The payment is made with an installment contract which makes payments to you over an agreed period of time.



STEP 4: Conference call with all parties to discuss the Deferred Sales Trust

CLARIFYING AND ANSWERING QUESTIONS WITH TAX ATTORNEY

Here is your chance to ask questions. Please bring your CPA or other trusted advisors to the call.

After discussing your case and should both parties determine the deferred sales trust is a suitable option due to a tax liability of at least $100,000 and net proceeds of at least $500,0000, then, with your approval, a conditional engagement agreement will be sent to you to review and sign.

We want to take off all pressure so this agreement is 100% conditional on the close of escrow for the asset sale and your approval of using the structure. This means there no obligation and zero is owed to anyone unless the structure is used. This means if for any reason you decide not to use the DST then zero fees are owned to anyone.

Checklist?

- clarify tax liability
- conditional engagement agreement understood
- meet and clarify parties involved
- clarify timeline of sale

HOW DO WE KNOW IT'S LEGAL?

1. DST TRACK RECORD

2000+ closes over 24 years. 100+ transactions per year with over $1,000,000,000 under management.

2. IRS AUDITS

15 successful IRS no change audits. 2 of the 15 were formal audits of the Structure and Law Firm with no particular client case in 2008 & 2019 and these were also "no change audits"

3. REVIEWED BY FINRA

The structure has been reviewed by FINRA and multiple National Tax Law Firms.

4. STRATEGIC PARTNERS

150 Financial Advising Firms with 1000+ Financial Advisors offer deferred sales trust. Deals closed with major national brands in CRE Brokerage, Title Companies and 1031 qualified intermediarys.

5. PRIVATE LETTER RULING

There is a private letter ruling and the outcome was favorable for the framework of the deferred sales trust structure.

6. WHAT HAPPENS IF THEY AUDIT ME?

Each DST is covered by lifetime audit defense at no addtional cost to you.

STEP 5:

Connecting the Deal with your Deferred Sales Trust

ENSURING ALL PARTIES ARE ON THE SAME PAGE

Next Step...

After you sign the conditional engagement agreement please connect us with the escrow officer, Business or Real Estate Broker, M&A attorney or anyone else helping you with the sale of your transaction. There is specific legal language we need to add to the purchase and sale agreement. We also have a large database of active brokers we can connect you with should you need guidance on the best broker to hire. If you don't yet have an escrow company, 1031 qualified intermediary or broker, let us know and we can help.

Checklist..?

- Did I send an email connected to all parties involved?
- Did I make sure my broker added the specific legal language to the purchase and sale agreement?
- Do I still need a realtor, cre broker, business broker or m&a attorney?
- Did I request risk tolerance questionnaire , answer questions and submit results.

Disclose all DST information relevant to the buyer who is purchasing your asset. Specific legal language will be provided to be added to the purchase and sale agreement.

NEEDED: Add this language to your purchase and sale agreement or counter with before the buyer removes all contingencies

The seller has right to a 1031 exchange or a deferred sales trust with no objection from the buyer or cost to the buyer. If you are considering a 1031 exchange, discuss with your accommodator and send the Deferred Sales Trust language. If you need a 1031 company, please email us and we will send you a list of those who have worked with us in the past and helped facilitate the Deferred Sales Trust cases.

A BEAUTIFUL RESULT, SEAMLESS PARTNERSHIP SEPARATION

MULTIFAMILY SALE

INDUSTRY investment real estate

SOLD $270,000 per unit at asking price

NO. OF DAYS TO SELL 3 months

After owning their property a decade, the seller's were ready to harvest their gain and increase their return on equity. A suitable 1031 was found, however, a family emergency triggered one partner to pull out of the deal which would have caused hundreds of thousands in tax liability to be triggered. Fortunately, the deferred sales trust was available to save this failed 1031 exchange and salvage the relationship. Both parties achieved financial success and this resulted in 40% of the gain being deferred – a tremendous outcome.

STEP 6: Clarifying Investments

HOW AND WHERE ARE THE FUNDS INVESTED?

After your risk tolerance questionnaire has been completed, an allocation will be presented. This allocation is a key document which determines how and where the funds are invested.

Investing shouldn't be complicated. That's why we have partnered with financial advisors who offer an investing platform powered by TD Ameritrade and built around you. Create a portfolio that fits your goals and aligns with what you care about because how you invest is as important as why you invest. Decide your initial level of distribution & what level of risk you're comfortable with. Then our strategic partners experienced investment team will design a diversified portfolio built around what matters to you.

See all the funds that make up your investment plan. Monitor your progress 24/7 online to see how you're performing and easily make adjustments to help keep you on track to meet your goal. Get started in just a few minutes and benefit from the investment expertise of seasoned financial advisors for your deferred sales trust investing.

Investment options: investment real estate , stocks, bonds, mutual funds, insurance, ETF's, develop CRE, Fund a Business Venture, Lending.

8%

MOST OF THE NOTES TARGET RATE IS 8% NET OF ALL RECURRING FEES OVER ANY GIVEN 10 YEAR PERIOD OF TIME AND CLIENTS LIVE OFF THE INTEREST OF *5-6% GIVEN A GAP BETWEEN INTEREST AND PRINCIPAL.

*NOTE: THIS IS ENTIRELY UP TO YOU AND PAST PERFORMANCE IS NO GUARNTEE OF FUTURE RESULTS .

SELLER STARTS A NEW JOURNEY WITH NO TOILETS TRASH OR LIABILITY.

Multifamily Sale

INDUSTRY Investment Real Estate

SOLD $1.775M and DEFERRED $550,000

After 30+ years of owning and managing his multifamily properties the seller was ready to step back and retire from the active management. He also wanted to be out of debt and have a chance to purchase real estate at optimal timing at a future date when he finds a deal. Life's too short for feeling trapped to own assets you're ready to sell. Don't you think?

STEP 7: Prepare to close

HIGH LEVEL OF COMMUNICATION

High level of communication between all parties. 7-30 days from closing. Naturally you want the closing to go as smoothly as possible.

Speak with Bank where funds will be held and understand how the funds are protected using Direct Access Control Agreement (DACA.)

Checklist...Did I..?

- have the conference call with financial advisor to review investments?
- approve investment allocation?
- speak with bank and gain a clear understanding of DACA?
- receive wire instructions and have escrow verbally confirm with bank to insure security of wire?

WHAT IS DACA?

The hybrid DACA (Deposit Account Control Agreement), Escrow Agreement is leveraged

- As a custom construct, not available in this form from any traditional bank.
- Prevents “constructive receipt”, which would invalidate the Gains Deferral Construct benefit to you.
- Provides you “line of sight” to the account and escrow proceeds.
- Enables you to secure and perfect your position as “noteholder” should you wish to file a UCC lien against Trust Assets.
- Prevents unauthorized use by requiring 2 party consent to the distributions, (you and your Trustee) for which we then process as “Escrow Agent.”
- Acts as both a transactional and documentary repository to all of the Distributions and Formation Documents to you, the trustee, the Estate Planning Supervisory Team as well as the Accountants and Tax attorneys.
    - Complete records are available on request and backed up according to stringent Bank required business continuity standards and regulations.

STEP 8: Documentation

SIGN CLOSING DOCUMENTS

Sign closing documents including; promissory note, trust documents, bank account documents, and assignment of interest.

Each Deferred Sales Trust is crafted to ensure it is accurate and represents your specific asset sale while adhering to numerous legal requirements and regulations.

TIP: Set a reminder for 6 months prior to your note expiring to ensure you have the option and time to renew your note. We will also remind you. Also, please give use the contact information for the trustee of your estate.

What you may want to review:

- Living Trust is up to date and includes the promissory note for the deferred sales trust
- Online access is granted for 24/7 viewing of accounts
- Mark to market report schedule is understood. This is a quarterly report detailing performance of investments.
- Potential passive investment real estate opportunities

STEP 9: Closing

THE DEAL IS SUCCESSFULLY CLOSED

Escrow funds the newly created Deferred Sales Trust and you revive access to view the funds online.

Investments are made based on your approval of the investment allocation and risk tolerance and funds are transferred to these investments from the bank with your signed approval.

*we highly recommend you add the deferred sales trust to your living trust so your heirs or charity can step into your shoes and receive payments from the trust when your estate passes.

Change or adjust payment or investments?

Along the way you may want to adjust the payments. Please know the note can be amended

What Types of Assets Can be Sold Using the DST?

Just about any asset that is subject to capital gains taxation can be deferred with the Deferred Sales Trust. These assets include businesses, rental properties, primary homes, commercial properties, private stocks, public stock, bonds, crypto currency, and insurance policies that need to be sold for cash. Most common types of asset sales using the Deferred Sales Trust are the sale of real estate or a business. The Deferred Sales Trust can be used for other types of asset sales and transactions such as: A 1031 Exchange that would otherwise fail to be properly completed can be "rescued" using the Deferred Sales Trust. Sales of marketable securities where there are restrictions on the stock or limited trading volume of such stock.

Invest for success

Ready to look at a private business or investment real estate? How much would a new deprecation schedule help you lower your tax liability? Let's talk.

Other assets to sell?

Did you know you can sell multiple assets and move them into one deferred sales trust? Consolidate your assets to gain freedom and to leverage all of your equity today.

Checklist & What to Expect

- ◯ Living Trust updated?
- ◯ Mark to Market Quarterly Reports released 4 times per year. This report details the investment performance to date.
- ◯ Look for a once per year (Feb) 1099-INT for any distribution the trust has made to you. Report this to your CPA for your personal tax return. *note- if zero distribution was made to you then no 1099-INT will be sent.
- ◯ Capital Gains Tax Solutions will file the tax return for each deferred sales trust. No action is needed on your part.
- ◯ Report any tax related escrow closing documents to your CPA for your personal return

SIMPLIFYING THE COMPLEX WITH ESTATE TAX

BUSINESS Confidential

INDUSTRY Investment Real Estate

PROBLEM: TOO MUCH INSIDE TAXABLE ESTATE

NO. OF MONTHS TO SELL 2 to 3
(after understanding deferred sales trust)

The DST saved 40% estate tax by moving the equity outside of this large taxable estate in one day at close of escrow without using insurance or gifting, Plus all of the growth moving forward in the trust will also pass to heirs estate tax free.

SIMPLIFYING THE COMPLEX. LETTER FROM OUR FOUNDER BRETT SWARTS

With over 10,000 babyboomers turning 65 every day in the U.S. it's no wonder many are selling their highly appreciated assets to retire. In fact, there are 77 Million baby boomers in the U.S. alone and many own a highly appreciated primary home, business or investment real estate. In fact, these 3 asset types represent 50% of all of America's net worth and can take up a huge amount of time and energy to manage the toilets, trash, employees, and liability.No matter what your age is owning properties and businesses can be stressful; especially if you're ready for a new start, new property, or a new venture.

Life's too short to feel trapped by assets you're ready to sell. Don't you think?

Given the record-breaking all-time economic highs in the marketplace and highly appreciated values, it's no wonder many are selling now and trading their toilets, trash, and liability in for time, travel, liquidity, diversification and tax deferral. With a deferred sales trust customized wealth plan, you'll get hours back in your day, debt paid off, liquidity in the bank and a passive or active income stream to retire on. Even better, you get freedom to sell high and buy back into investment real estate or a new business venture at any time, all tax-deferred, without using a 1031 exchange. **We call this optimal timing.**

Let's get started with a wealth plan today. Book a call today by going to capitalgainstaxsolutions.com

Here's to more time and energy to enjoy the wealth you have earned and to create and preserve more wealth for generations to come,

Brett Swarts
Founder, Capital Gains Tax Solutions

P.S. Deferred Sales Trust clients have deferred hundreds of millions of dollars in tax and shaved off a priceless amount of energy and stress. Book a call today

ABOUT BRETT SWARTS

Brett Swarts is an entrepreneur, cre investor, podcaster, deferred sales trust expert, and Nor. CA multifamily broker. His leadership roles include serving as the Founder of Capital Gains Tax Solutions podcast, Founder of Capital Gains Tax Solutions, and Founder of Commercial Realty Apartment Advisors.

He leads a team of extraordinary people at his companies. He has served billionaires, Doctors, Dentists, Veterinarians, Attorneys, Tech Entrepreneurs, Architects, CRE Syndicators/Operators, and more, to help them create and preserve their wealth through investment real estate. He leads them through this process by leveraging the optimal timing capital gains tax deferral structure known as The Deferred Sales Trust. Its purpose is to help individuals escape feeling hostage to the 1031 exchange and 30-50% capital gains tax when they sell their highly appreciated assets such as; a business, CRE, Crypto Currency or a primary home so they can create and preserve more wealth. By focusing on the timeless aspects of being the guide, and not the hero, Capital Gains Tax Solutions' educational platform inspires and helps high net worth individuals and their trusted advisors who help them such as Financial Advisors, CPA's, Business Brokers, CRE Syndicators, Realtors, Venture Capitalists execute a transformational tax deferred optimal timing wealth plan of their own.

Mr. Swarts is considered one of the most well-rounded Capital Gains Tax Deferral Experts and informative speakers on the west coast. His audiences are challenged to lean into multiple capital gains tax deferral strategies, create and develop a tax-deferred transformational optimal timing wealth plan of their own, and execute on this plan so they can create and preserve more wealth.

His experience includes numerous Deferred Sales Trusts, Delaware Statutory Trusts, 1031 exchanges and $88,000,000 in closed commercial real estate brokerage transactions. He's an active commercial real estate broker and investor with brokerage experience and ownership in multifamily, senior housing, retail, medical office, and mixed-use properties. He is a licensed California Real Estate Broker who has held Series 22 and 63 licenses.

Swarts has been featured in various notable podcasts across the web, including The Best Ever Real Estate Podcast with Joe Fairless, Lifetime Cashflow through Real Estate Investing with Rod Khleif, Apartment Building Investing with Michael Blank, The Real Estate Espresso Podcast with Victor Menace, RE Investing for Cash Flow with Kevin Bupp, The Project Egg Show and many more. Brett is a guest speaker every year, who trains 100's of business professionals at companies such as Marcus & Millichap, Keller Williams, Western International Securities, Multifamily Investing Academy & Equilus Financial Group, Inc. Brett lives in Roseville California, with his wife, Melanie and their 5 children.

THE 3 SECRETS OF OPTIMAL TIMING TRANSFORMATIONAL WEALTH PLAN MASTERCLASS

Email Brett with subject line: masterclass at brett@capitalgainstaxsolutions.com to gain free access.

- Debt Free
- Tax Deferred
- Wealth Diversified
- Wealth Liquid
- Option for No More Toilets, Trash or Liability
- Opportunity to grow wealth at optimal timing by going back into real estate as an active investor or passive.
- Time to enjoy wealth
- Goodbye 1031 or save a failed 1031
- New Depreciation Schedule for real estate investments
- Option to give to charity

Warning: viewers of this masterclass may never do a 1031 exchange ever again.

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