



Tax Strategy Summary

Investment advice offered through Integrated Partners, a registered investment advisor.

Tax Strategy Summary

PROBLEM	SOLUTION
High Health Insurance Deductible	Fund HSA
Sale of low basis asset	ING; CRT
High State Income Tax	ING Trust
Executive with ISO	Annual AMT exclusion planning
Use Standard Deduction & has RMD & Charitable Gifts	QCD
Business Owner High Tax Rate	Qualified Plan Max Funding with Catch up
Sale of Real Estate	1031; QOZ
Sale of Business	CRT; QOZ; 1202; Installment Sale; ING
QBI Benefit (High Tax Bracket)	Traditional vs. Roth Funding
Subject to Estate Tax	AEG; Lifetime Gifting; Freeze Techniques
Asset Protection	Fund Trust with Independent Trustee
Income & Estate Tax Planning	Use of Life Insurance in Trust