

Pre-Tax Wealth Creation Blueprint

EXECUTIVE SUMMARY

Who is the Ideal Candidate?



1 Business **Owner** or **Self Employed**



2 **\$500,000** Net Taxable Income



3 Around **45-65** Years Old



4 **0-50** Full Time Employees

How Does it Work?

Before Blueprint	
Mr.Smith W2	\$160,000
Mrs.Smith W2	\$130,000
Total W2 Income	\$290,000
Net Business Profit	\$1,000,000
Total Taxable Income	\$1,290,000
Taxes Due:	-\$535,000

After Blueprint	
Mr.Smith W2	\$160,000
Mrs.Smith W2	\$130,000
Pre-Tax Wealth Deduction	-\$1,000,000
Net Taxable Income	\$290,000
Net Taxes Due	-\$100,000
Net Tax Saving:	+\$435,000

What are the results of the Blueprint?



What is the Strategy

It is the process of converting TAXABLE business income to an asset-protected “private retirement trust” account that grows on a tax-deferred basis. It is designed to create larger tax deduction while minimizing asset exposure.

“Pre-Tax Wealth Creation” turns money that you would have paid in income taxes into your retirement wealth.

What are the benefits of the Blueprint?



Increase Control of Tax Payables and Cash Flow



Build up a Substantial Retirement Account Faster



Allows for an Exit Strategy



Attain & Retain Employees with Lucrative Benefits



Frees up Money for Other Investments

How are the Benefits Allocated for the Business Owners?

Name	Age	Compensation	Profit Sharing	Pension Plan	Aggregated Benefit 1	Aggregated Benefit 2	Total Allocations
Mr.Smith	56	\$160,000	\$0	\$382,000	\$48,000	\$100,000	\$530,000
Mrs.Smith	51	\$130,000	\$0	\$338,000	\$48,000	\$84,000	\$470,000
Total		\$290,000	\$0	\$720,000	\$96,000	\$184,000	\$1,000,000

What are the Investment Options?



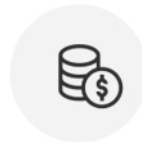
Insured Savings Account



Annuities Life Insurance



Stock, ETF Mutual Funds



Private Equity



Cash Treasury



Life Settlements



Real Estate Notes

Additional Information

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To learn more about our **Pre-Tax Wealth Creation Blueprint**, please contact Angie Tassone:

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