TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
754-200-1675

BUSINESS SUCCESSION

A smarter way to fund a buy-sell agreement

Combining leverage with a properly designed life insurance strategy can be a practical way to fund a buy-sell agreement.

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Funding the buyout without draining cash flow

This strategy can produce the funds needed for a future ownership buyout without requiring the business or owners to commit significant premium dollars from current cash flow.

LIQUIDITY WHEN IT MATTERS

Control for the owners, security for the family

Leveraged life insurance can provide the cash needed to carry out the buy-sell arrangement, which can help the surviving owners maintain control of the business while providing the deceased owner's family or estate with needed liquidity.

CAPITAL STAYS WORKING

Less strain on the business

When executed properly, using leverage for premiums may allow the business to preserve working capital, keep other assets invested, and

avoid placing added strain on day-to-day operations.

"There's no 'one size fits all' solution: each client requires a unique plan reflecting their unique capital, income, business, tax, estate and charitable objectives."

SCHEDULE A FREE STRATEGY SESSION

mike@taxefficientsolutions.com

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