TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
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GENERATIONAL WEALTH

Life insurance as the bedrock of generational wealth transfer

The most common challenge in multi-generational wealth transfer isn't identifying the right assets. It's preserving them intact across ownership transitions, tax events and family dynamics.

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The problem with illiquid estates

Real estate, closely held businesses and investment portfolios are all subject to forced liquidation, stepped-up basis complications or fractional interest disputes at the death of the primary wealth holder.

THE LIQUIDITY GAP

How permanent life insurance closes it

Permanent life insurance addresses the core structural flaw that undermines most estate transfer strategies: the liquidity gap. When a client's estate is predominantly illiquid, a properly sized death benefit provides the immediate cash needed to satisfy estate tax liabilities, equalize inheritances among beneficiaries and prevent the distressed sale of a business interest or family property.

Working with your team

Tax Efficient Solutions works in coordination with attorneys, CPAs, bankers and other advisors from an estate planning perspective, creating a plan that best fits the client and their family.

"A plan that minimizes tax exposure and maximizes the client's legacy."

Let us guide your client in bridging the gap between preserving their wealth and using creative, innovative and comprehensive solutions that will implement the best plan for the client and their heirs.

SCHEDULE A FREE STRATEGY SESSION

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