TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
754-200-1675

FOR CPAS, RIAS & ESTATE ATTORNEYS

We don't replace your team. We strengthen it.

Defined benefit planning works best as a collaboration: your relationship and expertise, combined with our specialized plan design.

CONTACT US

https://taxefficientsolutions.com/contact/

The best outcomes are built together

Your highest-earning clients already rely on a trusted team: a CPA for tax strategy, an advisor for investments and an attorney for estate and legal structure. A defined benefit plan touches all three. When it's designed in isolation, things get missed. When it's designed together, every piece of the client's financial life works in the same direction.

CLEAR ROLES, ONE SHARED GOAL

Everyone keeps doing what they do best

YOU CONTINUE TO LEAD

- **The client relationship**
  You remain your client's primary, trusted advisor.
- **Tax strategy & filings**
  Contributions are coordinated with your tax planning.
- **Investments & existing plans**
  Current accounts and 401(k) plans stay in place.
- **Estate & legal structure**
  Plan design supports the structure you've built.

WE BRING

- **Feasibility studies**
  Detailed modeling of what a plan could contribute.
- **Specialized plan design**
  A plan built around the client's age, income and goals.
- **Coordination with your team**
  We work through you, on your timeline.
- **Ongoing support**
  Annual guidance as the business and goals evolve.

What collaboration means for your client

- ✓ One coordinated strategy instead of competing recommendations
- ✓ Their existing advisors, accounts and retirement plans all stay in place
- ✓ Contribution decisions made alongside their CPA's year-end planning
- ✓ A clearer picture of how the plan fits into their tax, investment and estate goals

HOW WE WORK TOGETHER

A process designed around you

1. **A conversation with you first**
   You tell us about the client's situation and goals. Nothing reaches the client without your input.
2. **A feasibility study**
   We model the plan using information you help provide, including how it fits alongside existing retirement plans.
3. **A joint review**
   We walk you through the findings first, then present them to the client together, if and when you're ready.
4. **Ongoing coordination**
   Each year, contributions and plan decisions are coordinated with you as part of the client's broader planning.

"Our role is to add a specialized capability to the team your client already trusts. Never to replace it."

Let's talk about a client together

If you have a client who could benefit from a defined benefit plan, we'd welcome a conversation with you first. You stay at the center of the relationship, and your client gets the benefit of the whole team working as one.

SCHEDULE A FREE STRATEGY SESSION

mike@taxefficientsolutions.com

EXPLORE TAX EFFICIENT SOLUTIONS

HOME
taxefficientsolutions.com

WHO WE ARE
taxefficientsolutions.com/who-we-are/

OUR SOLUTIONS

ESTATE PLANNING
taxefficientsolutions.com/estate-planning/

PREMIUM FINANCING
taxefficientsolutions.com/premium-financing/

FOREIGN NATIONALS
taxefficientsolutions.com/foreign-nationals/

CHARITABLE PLANNING
taxefficientsolutions.com/charitable-planning/

LIFE SETTLEMENTS
taxefficientsolutions.com/life-settlements/

DEFINED BENEFITS
taxefficientsolutions.com/defined-benefits/

MORE

INSIGHTS
taxefficientsolutions.com/insights/

CONTACT
taxefficientsolutions.com/contact/

FOLLOW US ON LINKEDIN
https://www.linkedin.com/company/tax-efficient-solutions/

This material is for informational purposes only and is not tax or legal advice. Defined benefit plans involve funding obligations, administrative costs and restrictions on access to retirement funds. Contribution capacity and tax treatment depend on individual circumstances, plan design, applicable limits and tax law. Any strategy requires individualized review with qualified tax and plan professionals.