TAX EFFICIENT SOLUTIONS
Creating An Arbitrage

Fort Lauderdale, FL 33301
754-200-1675

ESTATE PLANNING

The most cost-effective way to pay for estate taxes

The most cost-effective way to pay for estate taxes is by buying life insurance. The most cost-effective way to pay for large life insurance policies is by using leverage.

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The power of leverage

Just as leverage has traditionally amplified opportunities in real estate and business deals, it can also deliver similar advantages when applied to large life insurance plans.

> HOW WE WORK
>
> ### Side by side with your team
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> We work side by side with CPAs, attorneys, bankers and other advisors to implement the correct advanced life insurance plan.

Your clients come first.

We can help guide your client in bridging the gap between preserving their wealth and using innovative and comprehensive solutions that will implement the best plan for your client and their heirs.

"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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OUR SOLUTIONS

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This material is for informational purposes only and is not tax or legal advice. Life insurance is subject to underwriting, and leveraged or financed premium arrangements involve costs and risks, including changes in interest rates and collateral requirements. Tax and estate outcomes depend on individual circumstances,

policy ownership and proper structuring. Any strategy requires individualized review with qualified tax and legal professionals.