

Bypassing Estate Tax

Wealth is most often built over a long period of time, through a lot of hard work and patience. While taxes can be a continual drag on the accumulation of wealth, in some cases it is at death that they take their greatest toll. The estate tax can reduce wealth passed to the next generation.

Estate taxes are extracted from wealth above a certain threshold that passes out of your hands at death. All that we own will eventually be owned by someone else, and at death anything not transferred during your lifetime will make the final transition to new owners. Will your estate be taxed? If so, how much will be due? Did you know that the IRS requires that estate taxes be paid within nine months of the date of death? If your estate doesn't have enough cash, what assets would have to be sold first? How easy would it be to find a buyer for them?

Would your family be able to get full value for your assets within the nine-month time frame? What if you were to die during a market correction and your family had to sell assets or liquidate investments in a down market to pay taxes?

Many families haven't considered how heavy the burden of estate taxes can be. How much of your estate would be owed to the government at today's values? What about in the future, if your net worth continues to grow for 10, 20, or 30 more years?

What if you had a solution that could help your family avoid the need to sell important liquid assets, or liquidate investments in a down market?

The Proprietary Organization strategies we provide is a sure and safe road to freedom providing the ultimate in tax advantages, asset protections, and privacy. Our Proprietary Trust Organization strategies have been one of the best-kept secrets of wealthy, financially sophisticated Americans for years. Now they are available to everyone. Let's discuss and you can decide if any of our strategies might be of interest to you.