

Join David Rutan, Financial Advisor with Waddell & Reed and
Marshall Stagg, Attorney at Law with Landerholm Law Firm for a seminar called:

“Retirement Planning Strategies for Highly Appreciated Assets”

Have you or a client ever experienced these situations?

- A commercial/industrial property investor or owner looking to generate income from a sale; however, they are reluctant due to capital gain taxes
- A property owner or investor is nearing retirement or wanting to get out of the game but is uncertain due to capital gain taxes
- A business owner wants to sell and retire on the income generated by the proceeds but is facing large capital gain taxes before the business owner is able to reinvest

These situations need financial, tax and estate planning. I invite you and your clients to come and learn how planning can help.

Overview of Topics:

- An introduction of the speakers
- An outline of the financial planning process and the reasons you should consider working with a financial and legal advisor before the sale of a highly appreciated asset
- The structure and effect of capital gains taxes (CGT) components and common strategies used in dealing with CGT
- Overview of a Capital Gains Bypass Trust or as more commonly referred to as a Charitable Remainder Trust (CRT)
- Hypothetical analysis of selling a highly appreciated asset and the effect of planning versus no planning
- The next steps
- Q&A Session

David Rutan offers Securities and Investment Advisory Services offered through Waddell & Reed, Inc., a Broker/Dealer, Member FINRA/SIPC and Federally Registered Investment Advisor.

Waddell & Reed is not affiliated with Marshall Stagg/Landerholm Law Firm and does not provide any legal or tax advice.