

Sample Script Messaging

DST OVERVIEW – SHORT VERSION

The Estate Planning Team specializes in Deferred Sales Trust for business owners and real estate investors who want or need to defer paying capital gain from the sale of their business and or real estate.

Deferred Sales Trust is a trademarked, specialized type of installment sale under IRC Section 453, that has a 25 - year track record of success, and has withstood close scrutiny from the IRS and FINRA.

Here is how our Deferred Sales Trust works.

- Before Seller takes actual or conditional receipt of funds from the sale of their business assets, our Deferred Sales Trust Attorney creates a trust and a secured installment contract that enables the Seller to transfer the funds to a secured bank account that requires our Trustee and the Sellers signature to release, access or invest assets.
- The Trustee will issue the secured installment note/contract to the Seller who becomes the note holder and secured creditor of the trust for a determined period, specified amount and interest rate that meets the Seller's needs.
- The proceeds from the sale of the Seller's assets are put into a Trust overseen by our Deferred Sales Trust qualified Trustee who manages the proceeds in the Trust investing the proceeds in suitable investments, subject to the written approval at every step by the Seller.
- Our Estate Planning Team's Trustee, Attorneys, CPA, and Financial Adviser work closely with your Client's Attorneys, CPA and You during the process, ensuring the Deferred Sales Trust is beneficial and profitable for everyone involved.
- Seller can select investments to put into the trust and may approve or reject any specific investment our Financial Adviser recommends to our Trustee to put into the trust to achieve the most profitable return on the money within the Trust.
- Seller has access to the trust during the Deferred Sales Trust term, that can be as long as 10 years, amended to be renewed for additional terms, and passed on to his or her designated heirs.