

Introducing the Deferred Sales Trust™

Hypothetical Scenarios

California Taxpayers

HYPOTHETICAL SCENARIO



Crypto Currency

Are you an avid investor in Crypto or just did some speculation and watch your values run sky high? Looking to take some chips off the table when prices soar without the crushing cost of capital gains taxes?

Potential Sales proceeds \$ 4,000,000
 Seller's Original Basis: \$ 300,000
 Taxable Gain: \$ 3,700,000

Federal Tax 20%
 CA State Tax 13.3%
 Medicare Tax 3.8%

Approximate Tax Due \$1,372,700

**Approximate Tax Due with a
 Deferred Sales Trust™ \$ 0**

Net proceeds for re-investment: (w/DST) . . \$4,000,000
 Interest Income at ~ 5% \$ 200,000

Net proceeds for re-investment (w/o DST) . \$2,627,300
 Interest Income at ~ 5% \$ 131,365

(~ hypothetical interest rate)

HYPOTHETICAL SCENARIO



Highly Concentrated Stock or RSU's

Employed with a Start-up or other fast-growing company? Own highly concentrated and highly appreciated stock or RSU's? Looking to diversify while prices are high? What if you could also defer the taxes on your sale?

Potential Sales proceeds \$ 7,500,000
 Seller's Original Basis: \$ 2,500,000
 Taxable Gain: \$ 5,000,000

Federal Tax 20%
 CA State Tax 13.3%
 Medicare Tax 3.8%

Approximate Tax Due \$1,855,500

**Approximate Tax Due with a
 Deferred Sales Trust™ \$ 0**

Net proceeds for re-investment: (w/DST) . . \$7,500,000
 Interest Income at ~ 5% \$ 375,000

Net proceeds for re-investment (w/o DST) . \$5,645,000
 Interest Income at ~ 5% \$ 282,250



Helping clients preserve their estate and protect their wealth

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