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## Reef Point, LLC

### GREG REESE | DST TRUSTEE

Greg Reese is the Founder, President, and CEO of AmeriEstate Legal Plan, Inc. and Reef Point, LLC. Both are based in Costa Mesa, CA. Greg, graduated with a B.S. in Finance from San Diego State University. Greg has more than 15 years of prior experience as a Real Estate professional and Registered Investment Advisor, and more than 25 years of high level estate planning experience.

Greg began his professional career as a licensed realtor, specializing in multi-family apartment sales and also serving as a due diligence specialist analyzing real estate limited partnership offerings for LPL Financial (Formerly Linsco Private Ledger). After obtaining his Securities and Insurance licenses, Greg helped his clients develop financial plans, managed securities, alternative investments, and insurance-related portfolios. During this time, Mr. Reese also actively engaged in real estate transactions for individuals, families, and business owners.



In 1998, after selling his financial advisory practice, Greg founded AmeriEstate Legal Plan, Inc. specializing in estate planning and asset protection planning which became an emerging need for his clients. For the past 23 years, AmeriEstate has served more than 45,000 clients, providing access to affordable expert estate and asset protection planning services. AmeriEstate has an extensive attorney provider network and has locations in six states.

In 2016, Greg became involved with the Estate Planning Team and was invited to apply to become a Certified Trustee for the Deferred Sales Trust™ (DST). Once vetted and approved, Greg and his team have completed millions of dollars in DST transactions. As a Trustee for the Deferred Sales Trust, Greg has successfully assisted numerous clients as they sought to exit from businesses, real estate, and even rare collectibles. His clients have significantly benefited from deferring taxes on the sale of their appreciated assets.

Greg's expert knowledge and background in Real Estate, Securities, and Insurance have made him a sought-after Trustee for the Deferred Sales Trust. As a DST Trustee, Greg brings a unique multi-disciplinary approach to helping owners analyze their exit strategies while considering their taxes, estate, and investment objectives and options.

Greg frequently speaks to various groups and guests at conferences and on radio programs about the DST, Living Trusts, other estate planning strategies, and Asset Protection Strategies. He also hosts a monthly DST webinar.

Greg has strong community ties to Orange County. He and his family reside in Newport Beach. Greg is a volunteer leader for the Boy Scouts of America and is active in his community and church. In his leisure time, Greg enjoys playing tennis, skiing and camping.

Helping Clients Preserve Their Estate and Protect their Wealth

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