

- **Who can benefit from this program?**
- **Does the IRS know about this?**
- **Is this process complicated?**
- **This sounds really expensive, what are the costs involved?**
- **Why haven't I heard about any of this before?**
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## **Who can benefit from this program?**

Anyone that has accumulated any type of capital appreciation. A person with appreciated land, investment property, commercial real estate, and even appreciated stock will benefit from this program. We offer options that provide capital gains elimination and/or deferral, which will provide our client the ability to control more of their wealth.

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## **Does the IRS know about this?**

Of course they do, in fact, these concepts and strategies are based on the laws they have written. Most of the laws have been in place since the late 1960's. Do not mistake creative planning with illegality. We do not deal in questionable practices that seem like great deals until the IRS finds out about them and then takes them away. These planning strategies come from the heart of the tax code.

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## **Is this process complicated?**

There may be the use of multiple strategies depending on the situation. The AAP advisory team looks at every situation differently. Through discovery and a

## FAQ

questionnaire, the advisory team will then develop a comprehensive plan that identifies specifically what the client wants and the goals they are trying to achieve. What makes the AAP team unique is that we have a proven system that bundles these concepts into a plan that is easy to understand and implement.

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### **This sounds really expensive, what are the costs involved?**

Again, depending on the situation, there may be some legal costs involved. In most cases, there is no cost involved in the overall plan. All costs are explained upfront before anything is put into motion. There is no cost to explore and completely understand your options.

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### **Why haven't I heard about any of this before?**

A great question. First you must understand that most of these strategies have been utilized for the ultra wealthy for years. We at AAP, through our marketing efforts and partnerships with several professional disciplines, are currently able to provide the same benefits to our clients that have been reserved mainly for the wealthy. Most people don't utilize the high priced CPA firms and tax attorneys, which is where most of the information has been held. It is also important to understand it has always been your job to find this out on your own, not the job of the tax preparer, CPA, or the government to discuss these issues with you, especially if you don't ask.

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### **What is the first step?**

Contact an AAP advisory team member via phone and/or email for more information on how you can explore and understand your options. Our advisory team is made up of all professional disciplines including Realtors, CPAs, Financial Advisors, and a legal team that works across the country to make this unique planning process available to you.

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