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Tax Advantaged Strategies

The timing of income and deductions can play a significant part in tax planning for high producing Sales Professionals, Highly Compensated Employees and Successful Business Owners & their business. The implementation of strategies can also have a significant impact on recruiting, rewarding and retaining key individuals.

1. **Non-qualified Deferred Compensation Plans** – Can be designed to provide deferral of income to a later time period when income or tax rates are lower. In addition, it can be used to reward, recruit and retain key individuals.
2. **Qualified Retirement Plans** – Can be designed to provide maximum flexibility with substantial accumulation and tax benefits for business owners and/or key individuals. Design strategies can target 70%-100% of benefits for Sales Professionals and Business Owner(s), depending on their employee composition.
3. **Tax Advantaged Investment Strategies** – Some investments provide tax deductions in the year made plus provide income that is partially tax sheltered; other investments strategies either provide tax deferred current income or convert ordinary taxable gains into capital gains or both; while other investment strategies provide tax free income distribution potential.
4. **Multi-generational distribution/tax planning** – Spreading distributions on accumulated wealth over multiple decades allows a family to defer paying taxes on their wealth and creating a multiplier of principal effect for their family members.
5. **Installment Sales** - A strategy on the sale of appreciated assets that allows for partial deferral of any capital gain to future taxation years.
6. **Tax Deferred Exchanges** – A strategy that allows a property owner to “exchange” one or more appreciated property held for productive use or investment for one or more other property held for productive use or investment. The strategy can involve the exchange of one business for another business, one real estate investment property for another real estate investment property, livestock for qualifying livestock, and exchanges of other qualifying assets.

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