



Parkside Financial

BANK & TRUST



Tax Mitigation & Asset Protection for Business Owners

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Objective /

A truly uncommon partnership is a rare collaboration. At Parkside we go above and beyond to provide strategic, efficient, and well designed solutions to improve the financial lives of our clients. They know we are committed, determined, and resilient, here for them in the good times and trusted in the face of challenges.

My objective today is to give you some insight into two areas we cover regularly with clients in our Family Office



Tax Mitigation





Estate Planning /

- Power of Appointment Trust
- Freezing Techniques For Estate
- Grantor Trust for Income Tax Leverage



Opportunity Zones

- Integration into Business Strategy
- Direct 3rd Party Investments
- OZ Funds



Conservation Easements /

- Existing Family Property
- Strategic Acquisition
- Syndicated Funds
 - Audit Issues



Tax Credits

- Federal Solar Credits
 - (Passive Income or C-Corp)
- State Income Tax Credits
- Oil and Gas Drilling/Exploration
- Research & Development Credits

Asset Protection

A black and white photograph of a small plant with several leaves and a single flower growing out of a crack in a concrete sidewalk. The background is blurred, showing trees and a building. The text 'Asset Protection' is overlaid in the center in a white serif font.



Phase 1

Asset Titling and Insurance
Coverage

- Insurance review
- How do you own assets?
- Joint Tenants by Entirety versus other forms of ownership (MO)
- Ownership by spouse



Phase 2

Managing Exemptions That
Can Protect Assets

- Federal Protection:
 - Retirement plan assets & 529s
 - Your IRA assets versus inherited
- State Protection:
 - Home equity exemption
 - Cash value of life insurance exemption



Phase 3 /

Aligning Asset Protection
with your Estate Planning
Goals

- Qualified Spousal Trust
- Irrevocable Trusts executed in the course of normal estate planning.



Thank You

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