ALPHA INNOVATION PARTNERS
NEXT GENERATION ADVISORS

INFINITY
FINANCIAL SERVICES

Professional Alliances for Enrolled Agents

Turning Tax Compliance into Comprehensive Wealth Strategy

Presented by Avi Crane
Financial Fiduciary & Investment Advisor Representative

2025 Tax Season Preparation

The Coming Storm: 2025 Tax Returns

Deadline: April 15, 2026

- **The Reality:** This is the busiest period of your year. It is a time of high stress and maximum output.
- **The Opportunity:** It is also the specific window where client engagement is highest. Your clients are not just thinking about filing forms; they are thinking about their money.

You are about to have the most attention from your clients that you will have all year. How will you leverage it?

Mid-April is a Filing Deadline for You, but a Source of Anxiety for Them

How do I lower this tax bill next year?

Is my retirement portfolio actually safe?

What should I do about my capital gains exposure?

While you focus on compliance and deadlines, your clients are asking complex financial planning questions. Do you have a fiduciary answer ready, or **just a referral to a stranger**?

The Professional Alliance Program: An Immediate “Force Multiplier”

We allow you to act as a full-service wealth management firm without the burden of infrastructure.

The “No” List	The “Yes” List
✗ No additional overhead	✓ Professional, fiduciary financial advice for your clients
✗ No additional liability	✓ An additional revenue source for your firm
✗ No additional time investment during tax season	✓ Seamless integration into your existing client workflow

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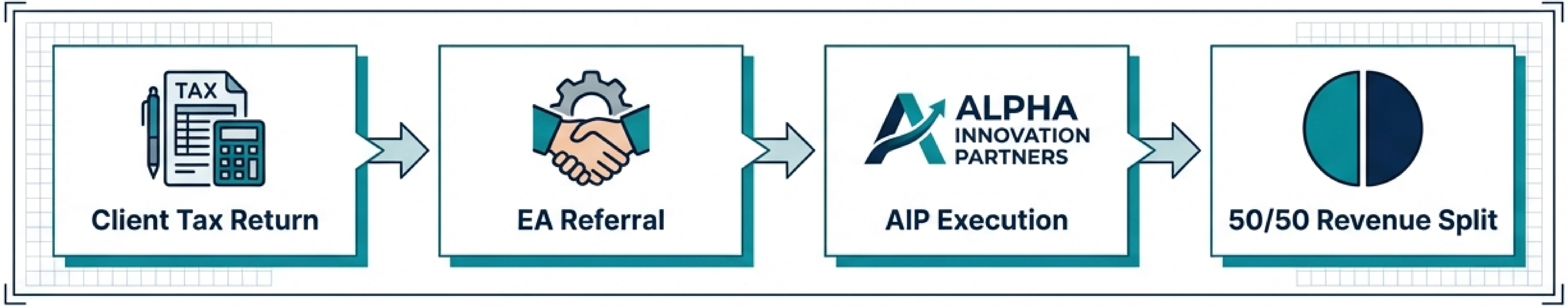
Revenue Sharing Through a Unique Structure



The Split

We offer legally structured revenue-sharing (50/50 split) with licensed professionals on advanced planning cases you introduce.

The Role

No selling required. You identify the need; we design and execute the solution.

The Standard

Our fiduciary standard ensures we work for the client, not the carrier.

Monetize the trust you have already built by solving problems you identify on the tax return.

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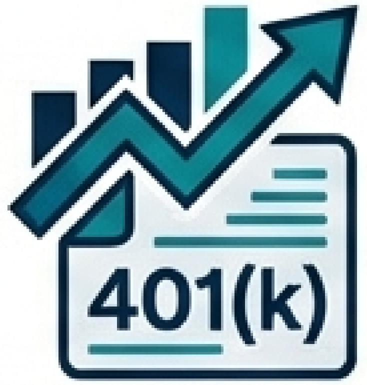
Solution #1: Tax-Deductible Retirement Plans & Pensions

Targeting business owners and high earners with significant tax liability.



Qualified Plans

- SEPs, SIMPLEs, and 401(k) plans designed to maximize contribution limits.

Advanced Pensions

- Defined Benefit Plans
- Cash Balance Pensions
- 412(e)3 Fully Insured Pensions

Structured for maximum deductibility and guaranteed retirement outcomes.

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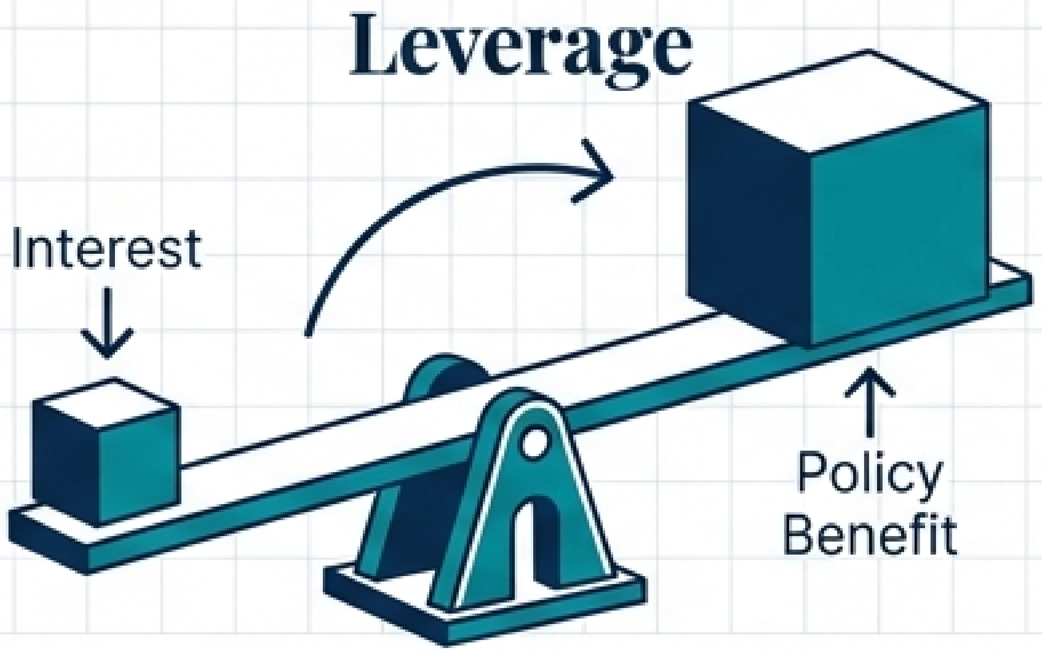
Solution #2: Premium Financing Strategy

For High-Net-Worth individuals needing estate protection without liquidating capital



A sophisticated strategy where clients borrow money to pay life insurance premiums instead of using their own capital. Utilizes Variable Rate Demand Obligations (VRDO).

Institutional Lending Partners

Goldman Sachs	BNY Mellon
JPMorgan	PNC Bank
Wells Fargo	Comerica

Securely protect wealth while maintaining liquidity through strategic borrowing.

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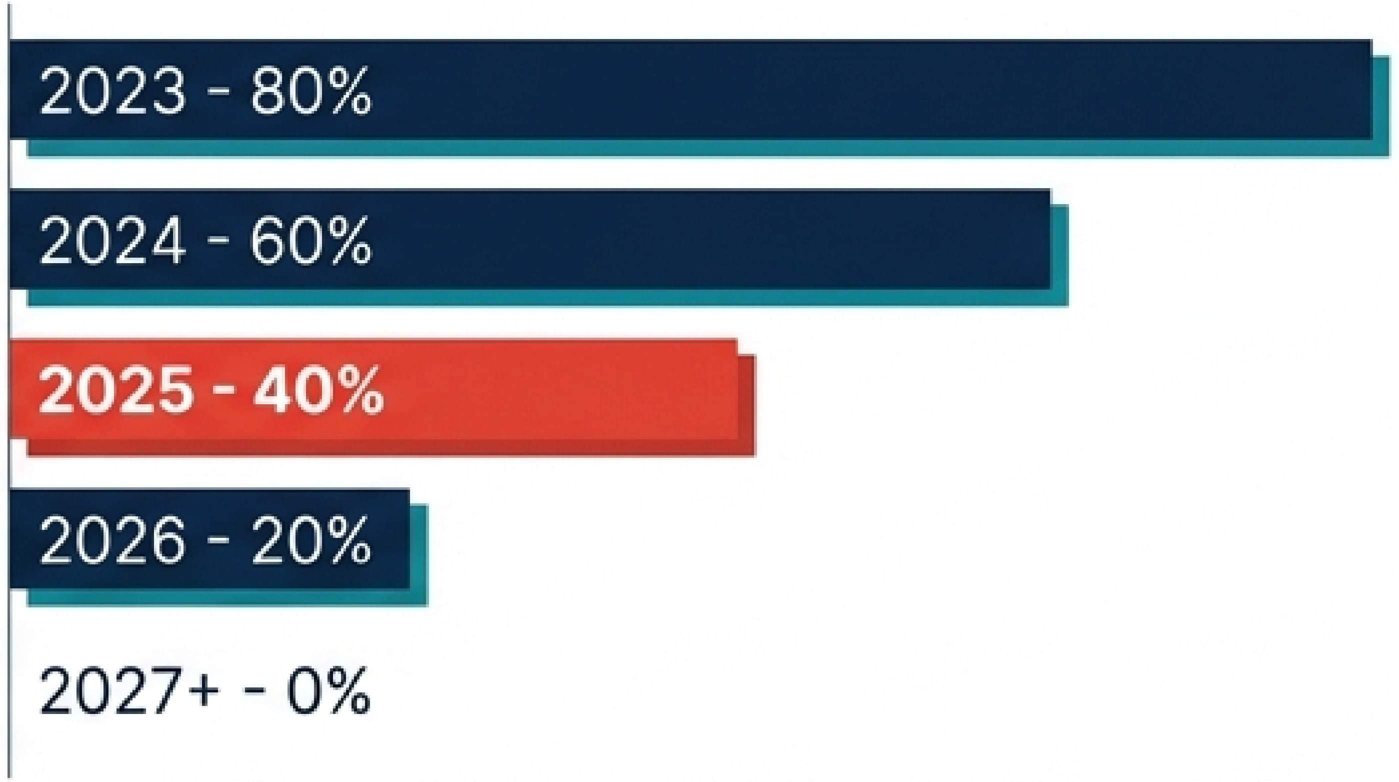
Solution #3: Real Estate & Capital Gains Reduction

- **Cost Segregation:** Engineering-based studies to accelerate depreciation.
- **Charitable Remainder Trusts (CRTs):** Defer or eliminate capital gains.
- **Delaware Statutory Trusts (DSTs):** Passive income and 1031 exchanges.

Bonus Depreciation Phase-Out Schedule



Timing is Critical. Immediate action is required to capture remaining depreciation benefits.

Case Study: The ‘Bay Area” Success Story

The Client Profile

59-year-old business owner, $7 million in S-Corp profits. Seeking tax mitigation.

The Solution

Implemented 412(e)3 Pension & VRDO Premium Funding Strategy.

The Results

- Tax Deductible Contributions: **$1.45 Million**
- Capital Gains Tax Liability: **$0**

$157,500

Revenue earned by referring broker

Why Work With Alpha Innovation Partners?

Independent Brokerage & Fiduciary RIA

Legally and ethically required to act exclusively in the client's best interests—not those of insurance companies. This aligns with your Circular 230 obligations.

In-House Expert Team

Attorneys, Third Party Administrators (TPAs), and seasoned advisors under one roof to handle complex execution.

Broad Market Access

Access to 60+ Top-Rated Insurance Carriers. We are carrier-agnostic.

The Three Pillars of Partnership Value

Client Retention

Be the "one-stop" shop. Stickier relationships prevent clients from drifting to competitors offering holistic services.

Risk Reduction

Partner with a Fiduciary. We provide oversight for company 401(k)s and legacy planning, reducing your professional liability.

Incremental Revenue

Our partners are compensated well. This program adds a significant revenue stream to your practice without requiring you to do the heavy lifting.

Building Wealth with Integrity and Purpose

Avi Crane

Financial Fiduciary & Investment Advisor Representative

SEC Registered Investment Advisor

- Specialist in multi-generational wealth preservation.
- Optimized corporate retirement plan management.

"Don't Risk What You Have and Need In Order to Pursue What You Don't Have and Don't Need" — Warren Buffett

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Let's Schedule a 20-Minute Synergy Meeting

Format: A brief Zoom call. No travel, no wasted time.

The Agenda:

- What we do for your specific client demographic.
- Why it matters to their financial health.
- How the partnership mechanics work.
- What's in it for you (Compensation & Retention).

Goal: To see if we are the right fit to support your practice this season.

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Secure Your Practice Before the Rush

Avi Crane

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I am actively expanding and looking to bring select Tax Professionals into our ecosystem. Let’s talk before your first client meeting.

Scan to Connect

Independent Advisor partnering with Alpha Innovation Partners & Infinity Securities.