The Architecture of Wealth: A Strategic Alliance for Real Estate Professionals

Unlocking massive new revenue streams while protecting your clients' wealth.

A Partnership Briefing by Alpha Innovation Partners

ALPHA INNOVATION PARTNERS
NEXT GENERATION ADVISORS

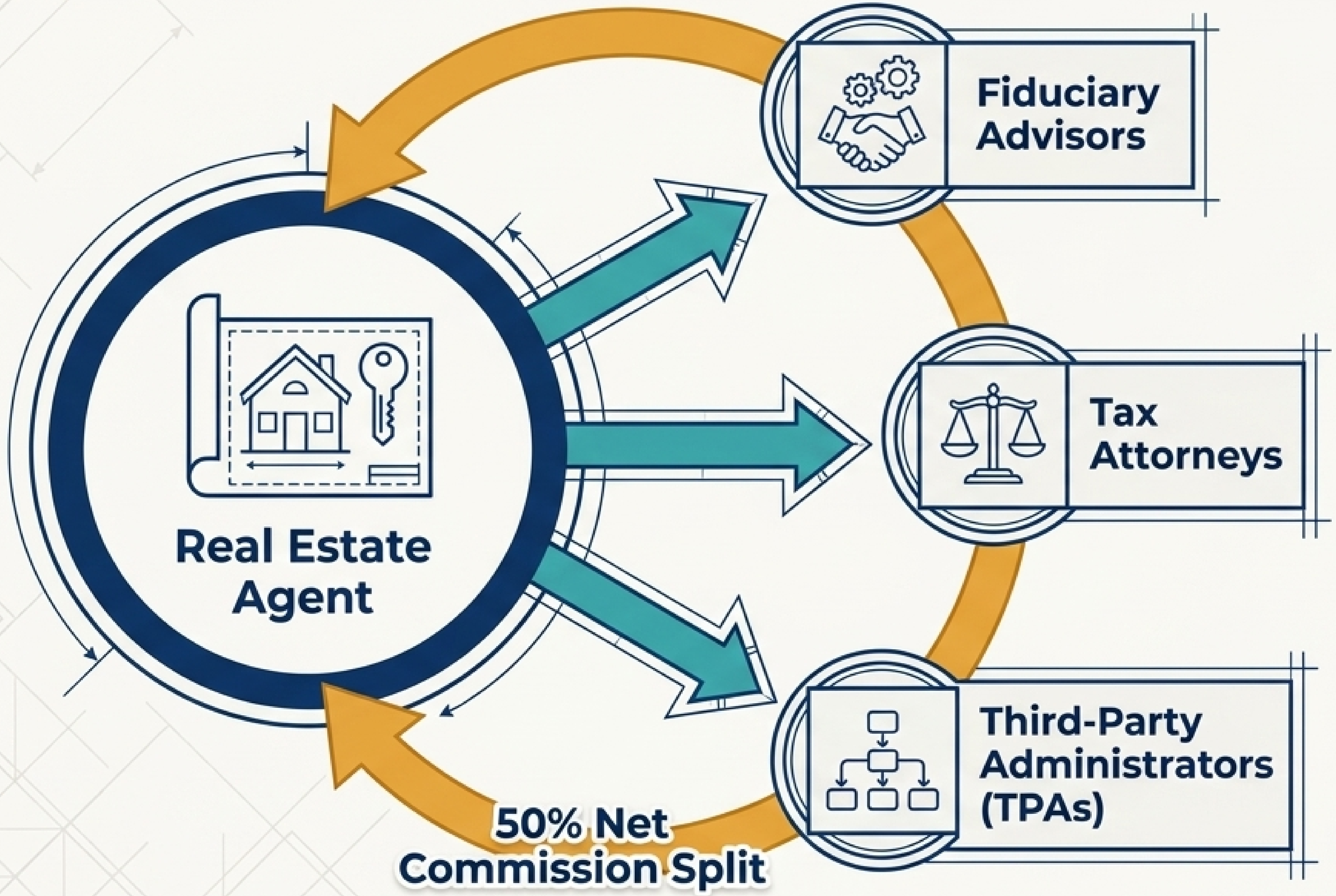
Think Like a General Contractor

You manage the overarching client relationship—the master build.

You bring in a tax renovation specialist to handle complex tax liabilities and advanced planning.

Unlike a standard referral fee, you act as a true partner. You legally retain a 50% split of the net commissions from the sophisticated financial architecture we build for your client.

A Seamless Revenue Engine



No Selling Required

You refer and co-position. Our in-house experts execute the complex case design.

Frictionless Integration

Add high-value, white-glove financial planning without disrupting your core real estate business.

Direct Revenue Sharing

Share 50/50 in the net commission generated from advanced planning cases through our unique independent brokerage structure.

Unwavering Fiduciary Commitment

Partnering with Avi Crane and AIP means working with an SEC Registered Investment Advisor and Financial Fiduciary.

SEC Registered Investment Advisor

Legally Bound

We are legally and ethically mandated to act solely in your client's best interests—never the insurance carrier's.

Carrier Agnostic

Independent access to 60+ top-rated carriers ensures tailored, unbiased case design.

Reputation Armor

Your clients receive best-in-class, ethical advice, elevating your status as a trusted holistic advisor.

The Threat to High-Net-Worth Home Sellers

The Context

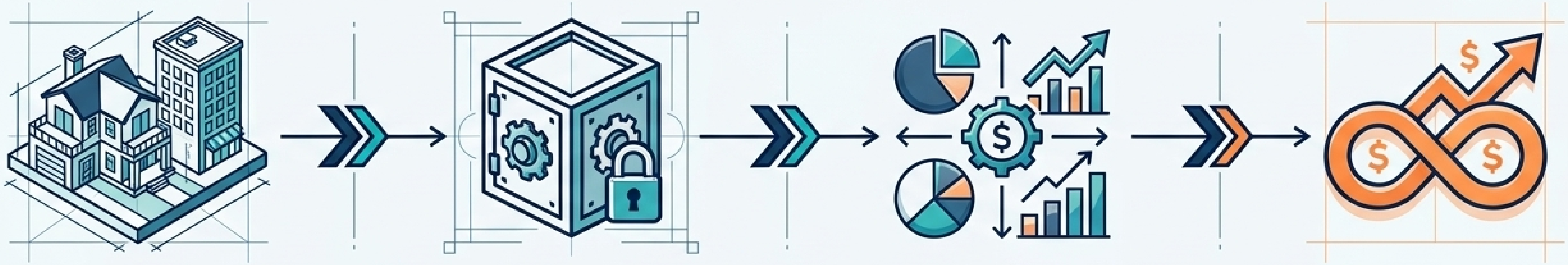
When clients sell highly appreciated assets (homes, commercial properties, or land), they face a devastating immediate tax hit.

The Transformation

What if you could stop the leak? We convert this massive tax liability into a revenue-generating event for your client—and a commissionable event for you.

Bypassing the Tax Hit: CRTs & DSTs

Mechanism: Charitable Remainder Trusts (CRT) & Deferred Sales Trusts (DST) allow clients to sell highly appreciated assets without immediate capital gains taxes.



Appreciated Asset → **DST / CRT Trust Structure** → **Tax-Free Sale & Diversified Reinvestment** → **Lifetime Income Stream**

The Math: Client selling a $6M asset	
Outright Sale	**Using a DST Structure**
~$304,710 / year after-tax income.	**$420,000 / year income.**

The Result: The full principal stays intact and keeps working, generating significantly higher cash flow.

Maximizing Buyer Value: Cost Segregation

Detailed engineering studies identify property components that can be depreciated rapidly (5-15 years) instead of the standard 39 years.

Client Benefits:

- Massive upfront tax deductions.
- Dramatically improved cash flow.
- Maximized ROI on new properties.

Partner Benefit: Every study conducted for your investor clients generates partner fees for you.

The Value of the Alliance

	Standard Real Estate Sale	The AIP Alliance Sale
Client Tax Outcome	Massive immediate capital gains tax.	**$0** immediate capital gains tax.
Client Proceeds	Severely reduced principal.	Full principal safely reinvested for lifetime income.
Agent's Role	Transactional broker.	Holistic Wealth Architect.
Agent Revenue	Standard RE commission only.	RE Commission **+ 50% split** on all financial planning cases.

Real-World Results: Real Estate Partner

Case Study Profile Card

The Scenario:

A 64-year-old client with 90% of their wealth tied up in a single $9M commercial property, facing massive capital gains upon sale.

The Architecture:

The AIP team implemented a seamless combination of a CRT, DST, and a 1031 Exchange into a Cost Segregation property.

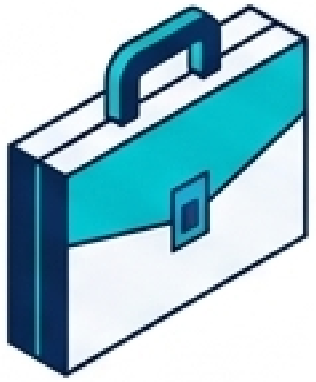
The Outcome:

The client reduced their capital gains tax to **$0**.

Partner Payout:

The referring real estate broker earned **$157,500** in additional shared commissions.

The Revenue Ceiling is Limitless



The CPA Partner

Client: S-Corp owner with $7M net profits.

Strategy: 412(e)3 pension plan, Premium financing, Cost Segregation.

Partner Commission:

$590,000

The Estate Attorney Partner

Client: Engineer with $13M in highly appreciated stock.

Strategy: CRT to create $420k lifetime income.

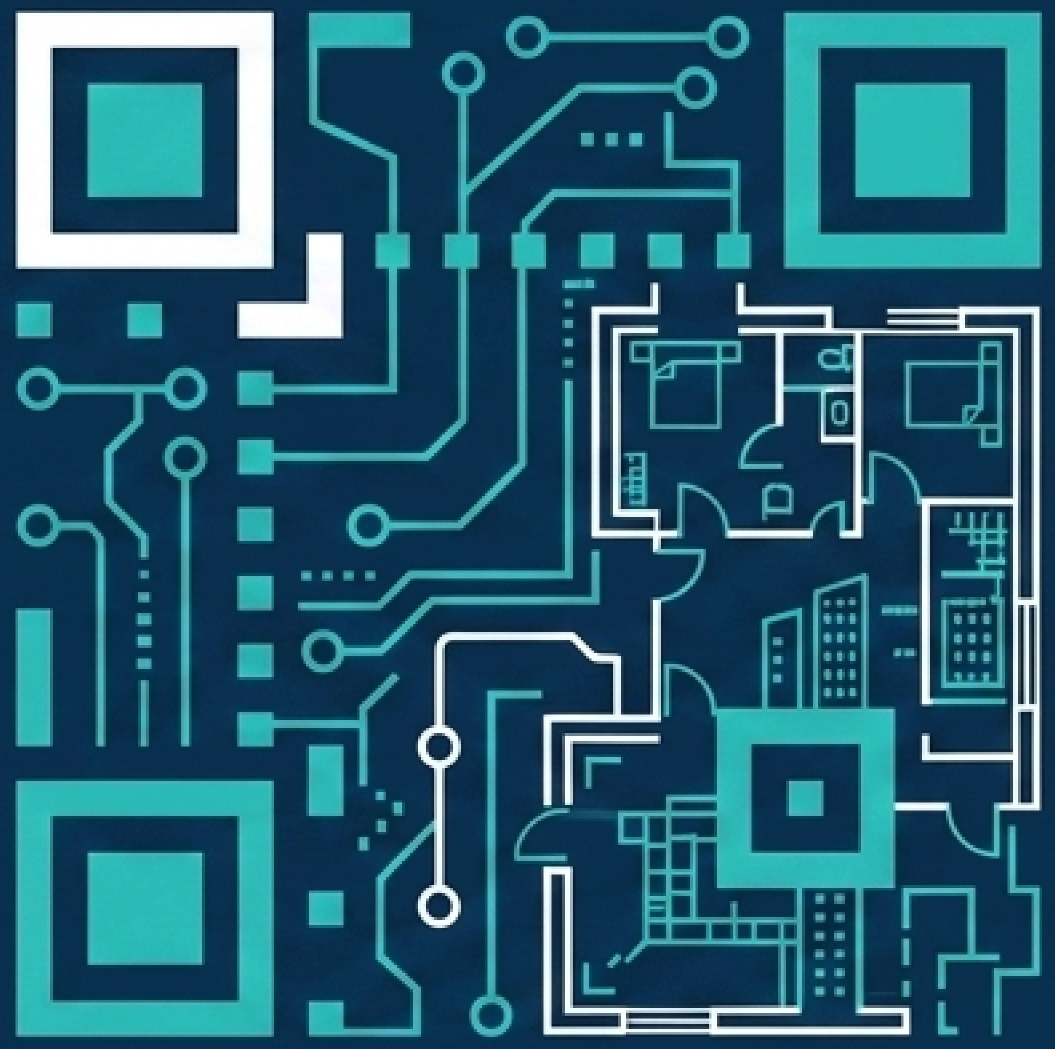
Partner Commission:

$167,500 (Plus $5,000 setup fee)

Takeaway: Any client with significant assets, high income, or a major liquidity event is an opportunity.

Build Your Clients' Wealth. Double Your Revenue.

Schedule your personalized partnership consultation today.



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