Beyond the Commission: Unlocking a Second Revenue Stream on Your Transactions

Comprehensive Tax Mitigation & Wealth Preservation Strategies for Commercial Real Estate Clients

Presented by Avi Crane, Financial Fiduciary | Alpha Innovation Partners

The Transaction Ends. The Tax Liability Begins.

For your clients, the transaction often triggers a massive tax liability—Capital Gains, Depreciation Recapture, and State Taxes.

The Status Quo

Deep Oxford Navy Inter Regular
You work hard to close the deal.
The client pays the IRS.
The relationship pauses.

The Opportunity

Deep Oxfod Navy Playfair Regular.
Turn tax liability into retained wealth.
Create a new, passive revenue stream.
Monetize th "tax phase" without doing the work.

Your Partner in “Holistic Alpha”

Avi Crane, Financial Fiduciary | Alpha Innovation Partners

Fiduciary Standard: Legally and ethically required to act exclusively in the client’s best interest—not beholden to insurance companies or investment sponsors.

Scale: Network of 110+ Licensed Brokers and 30+ Strategic Professional Alliances.

Expertise: A collaborative team of CPAs, Estate Planning Attorneys, and CRE Professionals under one roof.

The Partnership Proposition

Additional Revenue

50/50 Revenue Split

Legally structured revenue-sharing on advanced planning cases you introduce.

Zero Overhead

No new staff, no new software, no “selling” required.

You refer; we execute.

Zero Liability

Avi Crane operates as the Fiduciary.

The regulatory burden and case design responsibility sit with AIP, not you.

Deal Velocity

Help clients overcome “tax paralysis” to unlock new listings and inventory sooner.

The “White Glove” Hand-Off

1. Identify → **2. Introduce** → **3. Execute** → **4. Share**

1. Identify
You identify a client facing Capital Gains tax or 1031 issues.

2. Introduce
You introduce Avi Crane for a complimentary assessment.

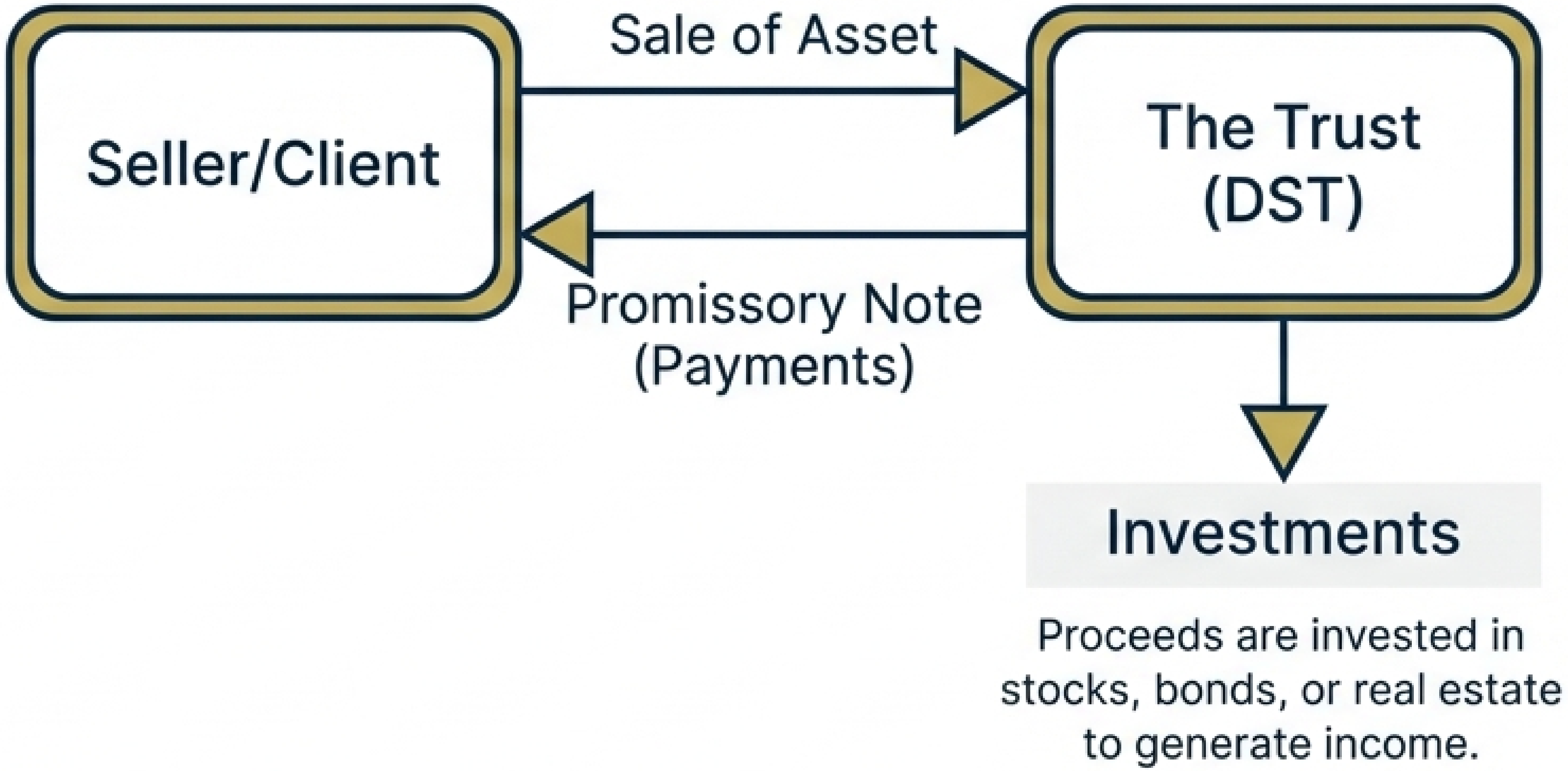
3. Execute
AIP’s in-house team (Attorneys, TPAs, CPAs) designs the strategy.

4. Share
Client saves money. We share revenue (50/50) with you.

You maintain the relationship as the trusted primary advisor.
We function as your specialized tax mitigation department.

Strategy A: The Deferred Sales Trust (DST)

For **clients** selling highly appreciated assets (Commercial, **Multi-family**) facing 20-30% Capital Gains tax.



- Defer Capital Gains Tax
- Generate Retirement Income
- Solve the “I can’t afford to sell” objection.

DST Case Study: The Cost of Selling Outright

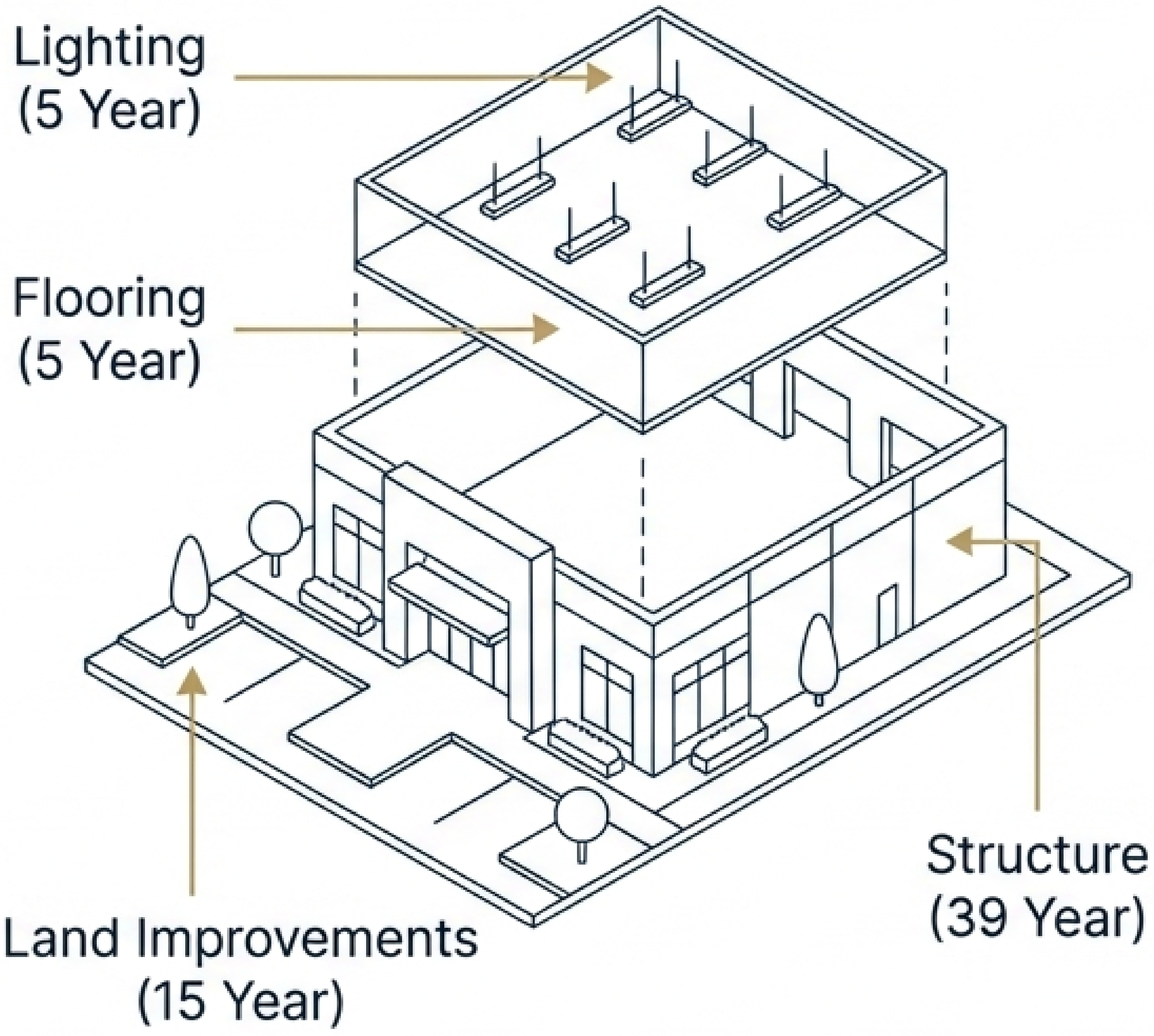
$6M Sale Price | $510k Cost Basis (90% Gain)

+$115,290

Additional Annual Income

You didn't just sell their building; you secured their retirement.

Strategy B: Engineering-Based Cost Segregation



Mechanism: Reclassify building components from 39-year depreciation to 5, 7, or 15-year recovery periods.

Result: Massive upfront tax deductions to improve cash flow for renovations or new acquisitions.

Time Sensitivity

Bonus Depreciation is Expiring.
2024: **60%**
2025: **40%**
2026: **20%**

Strategy C: Charitable Remainder Trusts (CRT)

Income + Legacy for High-Net-Worth Clients

Eliminate Capital Gains

The Trust sells the asset tax-free. $0 Capital Gains tax paid upon sale.

Charitable Deduction

Client receives an immediate income tax deduction in the year of the gift.

Lifetime Income

Provides a steady payout (e.g., 7% annual payout rate) for life.

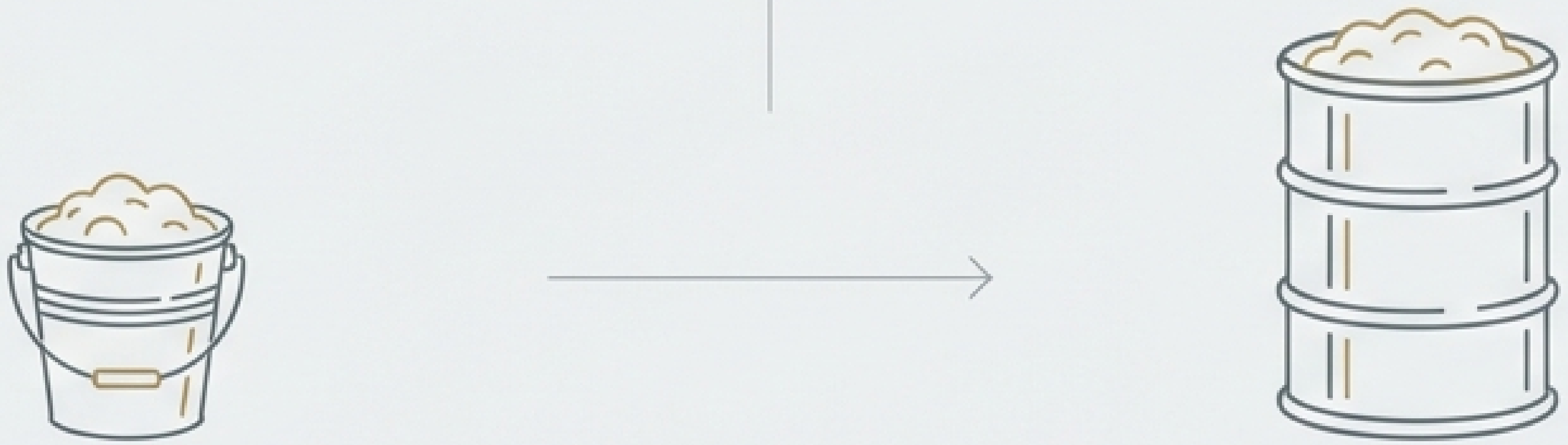
Real World Example

Example Case: **$6M** Asset. Result: Deferred **$2M** in taxes and generated **$469k** tax-free income in Year 1.

Strategy D: Advanced Retirement Plans

For Business Owner Clients constrained by 401(k) limits

Standard Solution	Advanced Solution
401(k) & Profit Sharing	Cash Balance & Defined Benefit Plans
$66,000 Limit	**$300,000+ Limit**

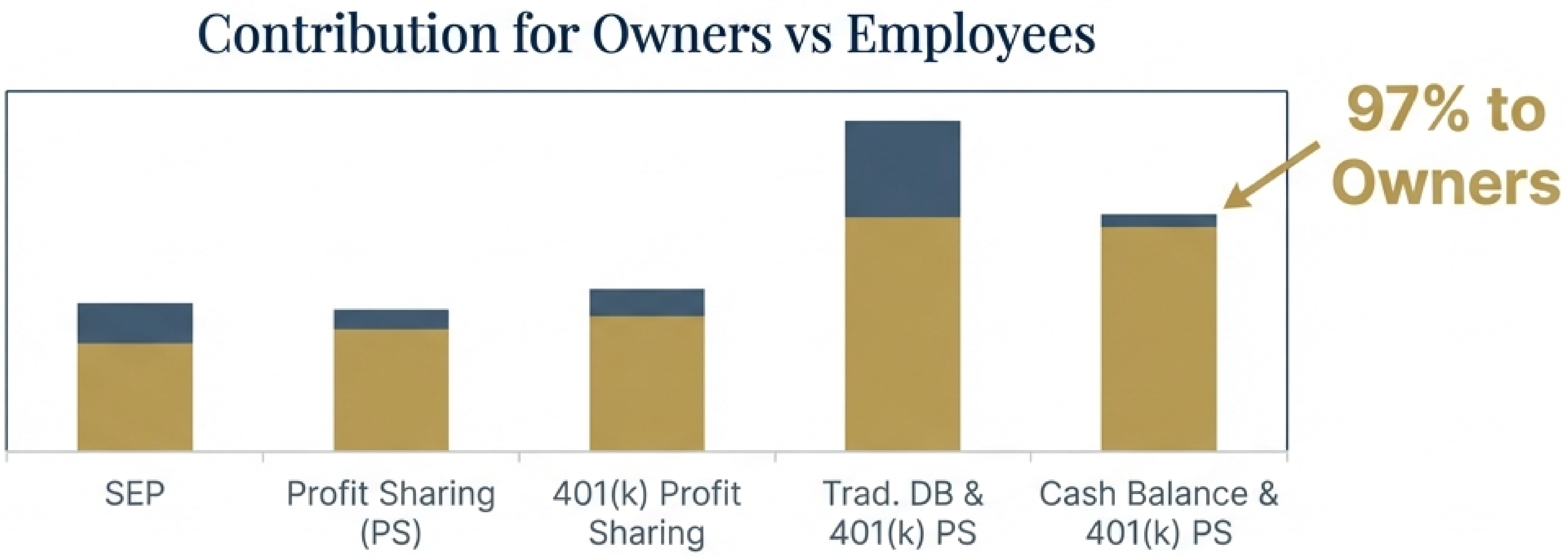


Result: Drastically reduces current year taxable income while accelerating retirement savings.

2024 Contribution Limits	
401(k):	$23,000
Cash Balance:	~$249,000+
Defined Benefit:	~$294,000+

Case Study: Maximizing Owner Benefit

Dentist Office Practice | Owners earning $500k/$200k



Tax Savings increased from $56k (SEP) to $148,089 (Cash Balance).

We optimize plan design to benefit the person writing the check—your client.

The Fiduciary Difference: Safety & Compliance

By referring to a Fiduciary, you protect your professional reputation and ensure your clients receive objective, regulated advice.

The Standard

As an RIA, we are held to the Fiduciary Standard—the highest standard of care in the financial industry.

Carrier Agnostic

Access to 60+ top-rated insurance carriers. Plans fit the client, not the carrier.

Endorsed Trust

Strategies recognized by leading organizations.

Cal CPA

CAMICO®
Insurance created by CPAs, for CPAs.

Evolving from Transactional to Holistic

The Old Model

- Sell the Building
- Collect Commission
- Client Pays Tax
- Relationship Ends

The New Model (With Avi Crane)

1. Sell the Building
2. **Defer** the Tax (DST/CRT)
3. **Preserve** the Wealth
4. Create **Recurring Revenue** (50/50 Split)

Differentiate yourself from competitors who only talk about cap rates and square footage.

Next Steps to Monetize Your Pipeline

1. **Review Your Book**
   Look for clients with highly appreciated assets, pending 1031 exchanges, or business owners with high tax liabilities.

2. **Make the Introduction**
   Connect them with Avi Crane for a no-obligation tax mitigation analysis.

3. **We Do the Heavy Lifting**
   Our team of attorneys and CPAs handles the case design and implementation.

4. **Revenue Share**
   We split the revenue on the planning case 50/50.

Partner with a Financial Fiduciary

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Financial Fiduciary | Alpha Innovation Partners

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"Your clients need tax solutions. You deserve to be paid for finding them."