

Here are a few of our strategies we use to help reduce taxes, increase wealth, and preserve legacies:

- Roth Conversion Tax Planning
- Tax Credit Investing Opportunities
- Utilizing Self-Managed / Private Placement Investment Opportunities
- Utilizing Retirement Accounts to Facilitate Private Placement or Private Equity Investment Opportunities
- Defined Benefit Plans
- Cash Balance Plans
- Capital Gain Deferrals
- Monetized Installment Sale
- Utilizing Qualified Opportunity Zone Investments
- Financing life insurance for the living benefits and tax-free income as well as estate planning
- 401(k)/IRA exit strategy
- Charitable Planning
- Charitable Foundation
- Donor-Advised Funds
- Cost Segregation
- Insurance Expense Management & Control
- Reinsurance Strategies
- Captive Insurance
- Family Office Planning
- Family Limited Partnerships
- Irrevocable Life Insurance Trusts (ILIT)
- Third Party Business Expense Management Consultants & Cost Reduction Analysis
- Premium Financed Life Insurance Retirement Savings Plans Funded in Part or in Whole with Annuities and/or Life Insurance
- Conservation Easements
- Deduction Income Shifting Arbitrage for Reduced Tax Rates to Family Members
- Depreciation Studies and Associated Method Change Opportunities
- Deferred Compensation Trust Arrangements
- 1031 & 1035 Tax Free Exchange Options
- Guaranteed Lifetime Income Planning with an emphasis on Wealth Accumulation
- The list goes on and on!



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At FIG Wealth Advisors, LLC, and our subsidiary Redwood Tax Specialists, we understand the challenges associated with traditional financial planning which has left many Americans behind in reaching their retirement goals and paying way more in taxes than legally necessary. It is easy for individuals or financial advisors to implement basic 401(k) or profit-sharing plans for tax-deferral and/or retirement planning. But are those plans really working?

If you are a high earner, the answer may be “no.” High-net worth individuals and business owners need plans that are designed to reduce current tax liability as well as accelerate their retirement savings.

Our goal is to stay within the IRS guidelines and help you build a solid tax reduction plan that will last for years to come. FIG/Redwood team of experts consists of CPA, Certified Tax Coach, Private Placement CPA (Emphasis on Oil & Gas Tax Reduction Strategies), CFP®, Certified Financial Manager, ERISA Attorney & Retirement Plan Specialists will look at how the individual tax strategy(ies) will work from a holistic perspective. Our goal is to stay within the IRS guidelines and help you build a solid tax reduction plan that will last for years to come.

And considering the U.S. tax code is over 5 million words long, it is crucially important to have a team that thoroughly understands and specializes in that code to significantly lower tax payments. Without this, you do not have a tax plan; you only have tax prep, and by then it is too late to take advantage of many valuable top-line deductions. When you work with a tax planning firm to cut your tax bill by around 50%, the results can be astronomical. Here are some of the major advantages for your small business:

1. [Slash your tax bill](#)

It is no secret: you want to take all available deductions. Yet most business owners pay more taxes than necessary. Why? Because their accountants search for deductions rather than creating them. Our customized tax reduction strategies do not

just look for deductions. Our holistic plans restructure your finances to slash your current tax burden. We cut taxes by around 50% nearly 100% of the time.

2. [Increase cash flow](#)

Every dollar you save on taxes means a healthier bottom line. Taxes are one of the most significant business expenses and reducing them makes a big difference. Our strategies also minimize taxes long term, so your cash flow continues to increase as time goes on.

3. [Fund future growth](#)

When you give less to Uncle Sam, you choose what to do with your money. By funneling tax savings back into your business, you can grow in new and exciting ways. You could use newfound savings to invest in new technology, hire employees, replace outdated infrastructure, and more.

At Redwood Tax Specialists, we use holistic planning to get you the biggest deductions possible. We will work with your accountant to develop and implement a plan to keep more money in your pockets. We can create tax savings that the average accountant cannot because our team includes specialists from across the financial and legal industries. You can also rest assured that our strategies are 100% legal and audit-proof.