Let us be a resource to you.

Our goal is to assist in putting your clients in a more optimal position, all while keeping more money in everyone's pockets - rather than lost to Uncle Sam.

The Silbernagel Group Inc.
Real Wealth Advisors®

Call our team when you need help to serve your clients or have any questions!

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HOW TO BE A HERO FOR YOUR CLIENTS' EXCHANGES...

no matter what

We are your local resource for DSTs!

The Silbernagel Group Inc.
Real Wealth Advisors®

Delaware Statutory Trusts (DSTs) – What are they and how can they help?

A Delaware Statutory Trust ("DST") is a Securitized Real Estate product that allows smaller investors access to larger institutional quality and professionally managed commercial properties. The DST entity structure allows the investor to own a fractional interest in a property(s) along with other investors, not as limited partners, but as individual owners within a Trust. Each owner receives their % share of the cash flow income, potential asset appreciation, and tax benefits (which may be a tax deferral when entering on a 1031, or depreciation if there's leverage on the investment).

- Fractional Ownership - most large estates, family trusts, endowments, pension funds, life insurance companies, and HNW individuals participate in fractional ownership
- DSTs make fractional ownership available to the everyday investor
- “Pre-Packaged” Investments with due diligence materials available via PPM
- Low minimum investment (typically $100,000)
- Institutional-Quality Real Estate with property types that may include large multi-family apartments, Class A office, industrial facilities, senior housing, self-storage, medical offices and more
- Properties that qualify for both 1031 and 1033 exchanges

Why we're different

The Silbernagel Group can be a resource to ensure that no opportunities are missed for your clients – we specialize in both Proactive Planning and Contingency Planning.

1. *Proactive education for tax planning tools for clients looking to exit*
2. *Alternative options if pending deals fall through or if they face a boot problem*
3. *What to do when identifying or closing deadlines are missed – there are still ways to be a hero to your client.*

The Silbernagel Group has experience in Qualified Opportunity Zones, General Partnership Oil and Gas programs, as well as charitable planning strategies that offset or defer the tax burden for clients that may have missed their deadlines. We work with the Concorde Investment Services Team who act as fiduciary to provide access to real estate properties that clients wouldn’t normally have access to on their own. They focus on the alternative asset and 1031 exchange space and have years of experience reviewing deals and building a robust due diligence process of these deals.

Check out all of our services!

How can DSTs help your clients?

- Way to diversify client’s holdings in real estate in terms of location, debt, type of properties, and sector – Access to assets types that clients couldn’t afford on their own.
- Potential increase in tax efficient net cash flow without having to deal with the four T’s of active management (Toilets, Tenants, Termites, Trash) - Mailbox Money for clients.
- Defer through 1031 exchange to keep more money generating income or growth for clients, rather than dollars lost to government taxes.
- Using 721 exchange to spread out Capital Gains to avoid higher tax brackets.
- Ability to dial in debt ratio to minimize or eliminate tax boot.
- Properties available to identify within the 45 days as both primary or backup.
- Leverage the sponsor’s experience and relationships

Listen to our podcast to hear more about how we impact clients' lives.