Have a unique tax situation in mind? We have many more strategies available - just give us a call!

(262) 626-8892

The Silbernagel Group Inc.
Real Wealth Advisors

Give Your Clients a Tax Workout That Works Out

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SG

Contact Us

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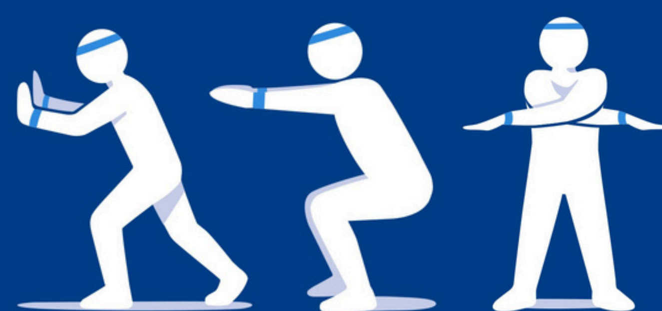
THE TAX EXERCISE

Whether you want to use us as your behind-the-scenes resource or bring us to the table as the tax strategist, we're here to help you deliver solutions — and strengthen client relationships.



DELAY

Client holding a property just to avoid capital gains? There's a better move.

- **1031 Exchange:** Delay capital gains when selling investment real estate.
- **DST (Delaware Statutory Trust):** Backup for failed or partial 1031s.
- **721 UPREIT:** Delay tax while converting real estate into REIT shares and provide potential liquidity.
- **Opportunity Zones:** Delay capital gains from any asset until 2026.*
- **Captive Insurance:** Delay taxes by pre-funding risk.

REDUCE

Clients paying more in taxes than they want? We'll help reduce that tax bill down.

- **Cost Segregation & Accelerated Depreciation:** Bigger deductions now.
- **Charitable Remainder Trusts (CRTs):** Reduce income tax, generate lifetime income.
- **Donor Advised Funds:** Immediate deduction, flexible gifting.
- **Oil & Gas Partnerships:** Up to 90% first-year write-offs.
- **Defined Benefit + Safe Harbor 401(k)s:** Stack deductions for business owners.
- **Discounted Roth Conversions:** Convert IRAs at a reduced taxable value.

ELMINATE

What if your clients could eliminate capital gains or income taxes altogether?

- **CRTs:** Can avoid capital gains entirely when donating appreciated assets.
- **DSTs:** When held for life, heirs receive 100% step up in basis, capital gains are eliminated away, up to date of death.
- **Opportunity Zones (held 10+ years):** All new gains and depreciation recapture = 100% tax-free.
- **Roth Conversions:** 100% tax-free income and distributions for life, and then 10 more years for heirs.
- **Estate Strategies:** We work with a team of professionals to reduce or eliminate estate taxes.

*New tax laws may extend this past 2026.

All strategies are based on current tax laws and are continually updated to minimize tax liability for clients.