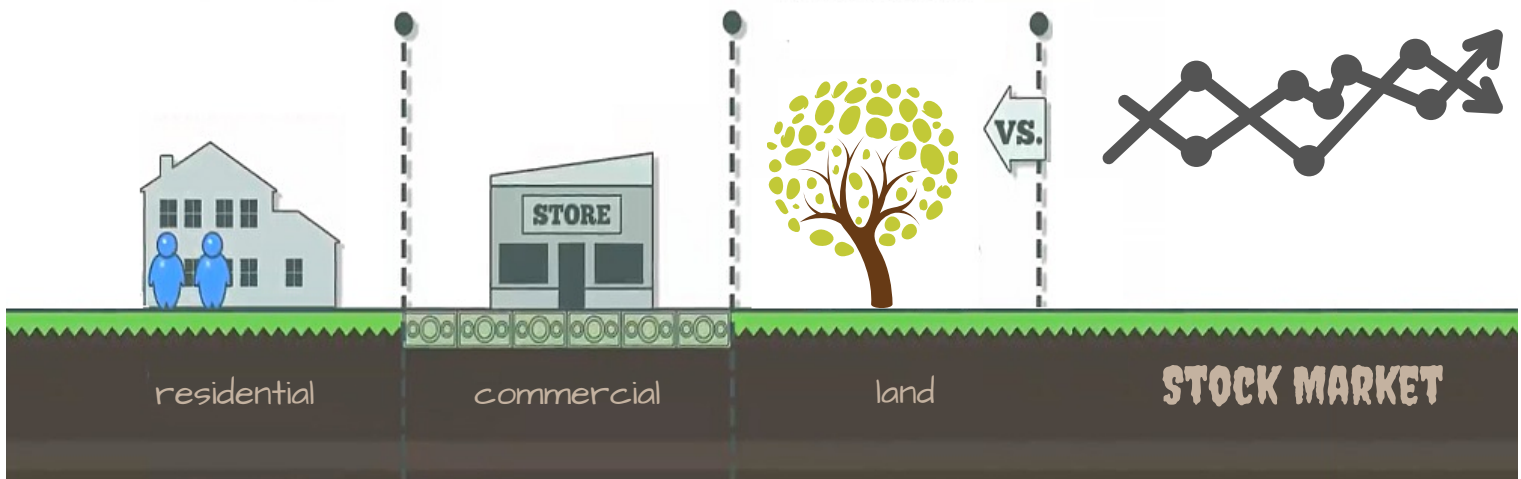




# 3 Tax Strategies for **REAL ESTATE** Investing



**Three one-hour classes;  
Register for one or all three.**

Each one-hour class will have open Q&A at its conclusion. No sales pitch whatsoever, just tax strategies from real estate tax expert, Patricia Lancaster, CPA.

\*\*Space is limited to 15 attendees per session.

**CLICK HERE:  
REGISTER Online!**

[PatriciaLancaster.com/Register/](https://PatriciaLancaster.com/Register/)

**Dec . 12<sup>th</sup>**

- 1** Self-Directed IRAs  
**9am or 5pm**
- 2** Like-Kind Exchange  
(1031 Exchange)  
**10am or 6pm**
- 3** Opportunity Zone  
Tax Credit  
**11am or 7pm**



**Location: The Westin at Bridge Street Town Center**



**Email: [Pittman@PatriciaLancaster.com](mailto:Pittman@PatriciaLancaster.com)**



**Phone: 256-325-3654**



## Self Directed IRA/401(k):

*Do you have an IRA, 401(k) or other retirement fund you'd like to take direct control of?*

Real Estate Investors have been profiting from this tax-free investment strategy since 1975. Investing directly in real estate is a thrilling alternative to traditional IRA investing but with the the same tax benefits.

While cash on hand may be limited, money sitting in your retirement account can open up new investment opportunities. A Self-Directed IRA is **not** for everyone, but the process is not complicated nor cost prohibitive. A good candidate for an SD-IRA is one who (1) wants to take control of his or her retirement dollars by investing directly in real estate and (2) is willing to do the research and follow the rules. You'll learn each step to forming an SD-IRA.

## Like-Kind Exchange, aka 1031 Exchange

*Are you anticipating a capital gain and want to DEFER the tax?*

Real Estate Investors have been profiting from this tax-free investment strategy since 1921. In simple terms, the Section 1031 exchange, commonly known as a "like-kind exchange," allows an investor to defer the payment of taxes on the sale of a property by using the proceeds of the sale to purchase another property. Learn the tax rules that make this a winning strategy for (1) growing net wealth and (2) deferring tax.

The strategy is neither complex nor cost prohibitive. A good candidate is someone who wants to continue investing in real estate rather than "cashing out".

## Opportunity Zone Tax Credit

*Are you anticipating a capital gain and want to AVOID the tax?*

This NEW tax strategy (resulting from the Tax Cuts and Jobs Act of December 2017) now has executable regulations. When it comes to deferring capital gains, investors are finding there's no place like home—provided home is near one of the 8,700 Opportunity Zones (OZs) certified by the Treasury nationwide.

A good candidate is someone who has or is anticipating a capital gain and wants to both defer and avoid capital gains tax.

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