



**Innovare Consulting
Development Group,
LLC**

Our New Planning Strategies for 2020



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Our Planning Mindsets

About Us

- We provide comprehensive consultative planning processes for our client's.
- We do deep dives into client's needs from current tax planning models to future tax efficiency distribution models, as well as, strategies to avoid the potential changes in the Federal Estate Tax Laws in 2025.
- We provide full transparency and objectivity to our products and services providers.
- We work with a team of highly competent professionals that can provide our clients with the best objective solutions.

About Us 2

- We provide innovative options for each of our solutions to our client's needs.
- We seek to model the most cost effective financial and tax planning solutions for our client's.
- We maintain constant communications on each of the steps of the process and conduct semi-annual reviews every year.



Our Promise

Innovare Consulting Development Group, LLC

- We are a full-service financial service organization.
 - Tax planning Strategies
 - Leveraging Planning Strategies
 - Legacy Planning Strategies
 - Tax Efficient Distribution Strategies
 - International Planning Strategies
 - College Merit Based Funding Strategies
 - Investment Planning Strategies

Competitive Service

- We have access to 40 A rated Financial Services organizations.
 - We do comprehensive analysis and provide a minimum of three model planning solutions.
 - We will always provide the most competitive pricing and services.

Chart Options

Our Four Strategies

1. Tax planning strategies for professional or business owners.
2. Leveraging premium financing strategies for retirement planning or legacy planning.
3. Cost segregation strategies for real estate owners.
4. Tax Efficient Retirement distributions Strategies.



Table Option- Age 45

What are your Goals and Lifestyle?

CURRENT PLAN	10 YEARS LATER	20 YEARS LATER	AGE 70	AGE 75
TAX PLANNING-CURRENT TAXES	TAX PLANNING-CURRENT TAXES	ACCUMULATION & DISTRIBUTION PLANNING-TAX- EFFICIENT	ASSET PROTECTION MANAGEMENT	SEQUENCE OF DISTRIBUTIONS RELATIVE TO ASSET EXPOSURE & TAX STATUS
ESTATE PLANNING	LIFE PLANNING FOR CONTINGENCIES INHERENT IN CHANGE	TAX DEFERRED, TAX-EFFICIENT & TAX FREE ACCUMULATION OF ASSETS	FINANCIAL SECURITY	NEXT GENERATION PLANNING FOR BUSINESS & LIFE GOALS
INVESTMENT & EDUCATION PLANNING	INVESTMENT & COLLEGE PLANNING	BUILDING WEALTH ABOVE INCOME	INCOME PLANNING & PRESERVATION	ASSET TRANSFER, GIFTS & INHERITANCE, BUSINESS EXIT, SUCCESSION PLANNING
LIFE & DISABILITY INSURANCE PLANNING	ASSET & INCOME PROTECTION PLANNING	TAX-EFFICIENT GROWTH & INCOME MAXIMIZATION	LIVING BENEFITS FOR BUSINESS & PERSONAL ACCOMPLISHMENTS	INCOME STABILITY, LEGACY PLANNING, CHARITABLE GIVING

Let's work together to accomplish your goals.





**Innovare Consulting
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Thank You.



Benjamin K Zales



929-253-2684



Benjamin@innovareconsultingdevelopmentgroup.com



www.innovareconsultingdevelopmentgroup.com