

YOU ARE CORDIALLY INVITED TO THIS
COMPLIMENTARY EDUCATIONAL WEBINAR SERIES

"Tax Efficient Capital Transition Strategies"

- ❑ Review the basics of Internal Revenue Code 1031 that allows for the deferral of taxes on the sale of investment real estate
- ❑ Discuss key strategies that may maximize real estate income and estate planning efficiency
- ❑ Go from active real estate owner to passive investor with the potential to upgrade holdings and increase portfolio diversification
- ❑ Learn about Qualified Opportunity Zone Funds that can defer capital gains tax on the sale of any asset and grow wealth tax free

JOIN US TUESDAY JUNE 13, 2023, 12 PM EST

[CLICK TO RSVP](#)

After registration you will receive email instructions with a link to attend this informative webinar.

UPCOMING EVENTS

**TUESDAY SEPT 19, 6 PM EST AT BLUE BELL COUNTRY CLUB
50TH ANNIVERSARY TAX STRATEGY CELEBRATION**
Come in person or via electronic webinar to celebrate the Baum, Smith & Clemens 50th Anniversary with tax tips and tasty treats.

**TUESDAY NOV 14, 12 PM EST
YEAR END INCOME TAX MITIGATION STRATEGIES**
Learn about key strategies that must be implemented by year end to potentially reduce income tax liability.

YOUR HOSTS AND
GUEST SPEAKERS



Todd Lofgren, Mid Atlantic Director

Jason Pueschel, Managing Director

Securities offered through Patrick Capital Markets, LLC
Member FINRA/SIPC

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