Our Realtor Assistance Program provides a resource for real estate professionals to distinguish themselves from other realtors. Become your client's hero and realize more sales by partnering with us to answer questions like these for your clients:

- **How will a home purchase impact your client's tax return?**
  The deductions realized by home ownership may improve cash flow for the buyer and even impact the decision they make on the price of the home the can afford. We can simulate a tax return and provide a clear picture of this.
- **My client wants a financial planner that understands real estate as an investment.**
  We are very unique in that we often discuss adding a real estate investment as an adjunct to our client's traditional investment portfolio. We can explain the use of leverage and how it can generate returns for the client.
- **Who can my client turn to navigate the record keeping and tax documents associated with owning a home or investment property?**
  We specialize in taxes and bookkeeping for property owners.
- **How do clients free up funds to purchase property?**
  We can review a client's portfolio and discuss things like using a self directed IRA of Roth IRA for first time homebuyers.
- **What is the right mortgage for the purchase?**
  This is impacted by many variables. We can review this with the client and make recommendations.
- **My client is new to the area and needs tax & financial services.** Our firm has been a mainstay in the community since 1990. We specialize in taxes including relocations and *out of state returns*. We also provide wealth management including 401K plan rollover options *for individuals with new employers.*
- **My client is retiring or elderly.** We can help your client convert the proceeds of the sale into retirement income or assist families with estate planning issues.
- **New homebuyers may not be able to afford the mortgage payment individually.** Life insurance can be used to protect the family and pay off the mortgage in the event of unforeseen circumstances.
- **Should my client use some type of entity to purchase their property?**
  We can provide entity planning and prepare taxes for corporations and LLCs.
- **How can my client minimize paying tax when real estate is sold? Timing of the sale, 1031exchanges and TICS are just of few of the things we can discuss with your client.**

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