



ADMINISTRATIVE AND MANAGEMENT SUPPORT FOR YOUR CLIENT'S DIRECT IRA INVESTMENT

There are many types of eligible investments within a direct invested Individual Retirement Account (IRA). They include and are not limited to: real estate, non-publicly traded equities, unit trusts and secured contracts and notes. We provide implementation services for the strategies developed by you as an investment advisor on behalf of your client. We administer the process to direct invest your clients funds to fulfill targeted goals within their financial plan. Also, we provide consultation services for Investment Advisors who prefer a team approach.

If you have a question regarding the acceptance of a specific investment scenario, strategies or desire implementation services for Alternate Asset and/or direct investment assistance, please contact us at: 716-462-4484.



EMBASSY CAPITAL GROUP, LLC
368 Broadway Street
Buffalo, New York 14204



DIRECT INVESTING

Customized
Pre-Packaged
Tax Free Investment Strategies
and Implementation Services



EMBASSY CAPITAL GROUP, LLC
DIRECT INVESTED IRA STRATEGIES
Pre-tax, Tax Deferred and Tax Free Conduit
WWW.ECGFS.COM

TAX FREE STRATEGIES FOR DIRECT INVESTING

THE SIMPLE PLAN... REDUCE TAX IMPACT

Embassy Capital Group, LLC assist the financial advisor to achieve their Client's financial goals identified when they developed the client's financial plan. We are the financial advisor's "back office". We administer and manage the process for implementing *Alternate Asset Strategies*. We keep the process simple, effective, and practical.

The tax efficient plan is purposed to minimize your client's tax related expenses while limiting the risk of paying more than their fair share of taxes. The ability to shelter earned income from taxation, experience tax deferred growth, and direct invest the funds without withdrawal penalties or income tax is a powerful tool for building, managing and utilizing wealth.

Do not allow your client to miss a financial opportunity nor have them over-taxed due to lack of a strategy.

EMBASSY CAPITAL GROUP IS THE "BACK OFFICE":

We assist financial advisors to implement strategies specific to their client's financial plan. We also provide the specific design, implementation, and administrative services inclusive of post closing activities (i.e. ...loan servicing).

BEYOND 401-K & Traditional IRA

Take advantage of the opportunity to structure and fund investments due to the enhanced control over your pre-tax accumulated and tax deferred assets. Direct invest your client's tax-qualified funds while controlling the access to capital and benefit from local or national investment opportunities.

LIMIT THE IMPACT OF TAXES

We assist investment advisors to strategically plan and invest their clients tax qualified capital without triggering early withdrawal penalties or income tax liabilities while financing the following types of investments:

REAL ESTATE

Purchase of Property (Any Type)
Secured Loans (Trust Deeds/Mortgage Notes)
Tax Lien Certificates

PRIVATE PLACEMENTS

Limited Liabilities Companies (LLCs)
Limited Partnerships (LPs)
C-Corp
S-Corps (Certain Banks Only)
Unsecured Loans

PUBLIC ASSETS

Stocks/Bonds
Mutual Funds
Certificates of Deposits

TAX QUESTIONS ABOUT YOUR CLIENT

Consider the following questions and forward the completed form via fax to: 888.425.9006

Do you manage the economic benefit of access to your clients Tax Qualified Wealth?

- YES
 NO
 I'm Not sure

Are You Interested In Custom Pre-Packaged Tax Strategies?

- YES
 NO
 I'm Not sure

Do You Know the capacity of your Client's FINANCIAL PROFILE?

- YES
 NO
 I'm Not sure

Do You Desire A Confidential Client Scenario Consultation?

- YES
 NO
 I'm Not sure

Comments:

Name

Address

Email

Phone

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