
SERVANT
CAPITAL
ADVISORS

**Tax
Strategies**

Basic Tax Strategies

- 401(k) with Employer Match
- Roth 401(k)
- Roth IRA, two-step Roth IRA
- Rollover IRA
- 529 Plan
- Health Savings Account
- Long-Term Capital Gains
- Home & Mortgage Deductions
- Donor Advised Fund

Advanced Tax Strategies

- Variable Universal Life Insurance
- Private Placement Life Insurance
- Solo Roth 401(k), SEP IRA
- Roth IRA Conversion (with Discount & Leverage)
- Real Estate Investing
- Annual Gift Exemptions
- Family LLC
- SLAT, GRAT, IDGT
- Private Foundation

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