EXIT STRATEGY FOR TODAY'S REAL ESTATE INVESTOR



MARTINSEN
WEALTH MANAGEMENT

MARTINSEN WEALTH 1031 EXCHANGE

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WHAT IS A DST?

Delaware Statutory Trusts (DSTs), allow owners of real estate to sell their rental properties and potentially defer capital gains taxes. DSTs have become an investment vehicle for *accredited investors who want the benefits of owning real estate without becoming a "landlord", as well as current real estate investors who no longer want the responsibilities of being a landlord.

WHAT ARE THE MAJOR BENEFITS OF A DST?

PASSIVE INVESTING: Relinquish the responsibilities of managing properties and exchange them for freedom without giving up potential profits.

EXCHANGE TERRIBLE T'S FOR TERRIFIC T'S: Don't be the landlord who dreads answering the phone for fear that the voice on the other end will present you with a Terrible T (tenants, toilets, trash, turmoil). Instead, enjoy retirement with the Terrific T's (travel, time, tax savings).

DIVERSIFICATION: Invest around the country. You choose from investments offering various property types, debt leverage, and location of properties amongst many other attributes.

INCOME GENERATING: Collect monthly income on-time to enjoy the golf course or take the dream vacation you've always wanted.

DISASTER AND EMINENT DOMAIN SOLUTIONS: If your investment property was lost from fire, hurricane, or eminent domain, you can use DSTs in a Section 1031 exchange and defer the capital gains tax, as well as preserve the step-up in basis opportunity.

TAX BENEFITS: Through a DST 1031 exchange defer all capital gain income tax through purchase of like-kind investment property. Don't leave a spouse/heirs unwanted tax burdens or landlord responsibilities.

I EVER TRULY RETIRE?

YES, YOU CAN!

Real Estate investing can be extremely rewarding financially. If you have succeeded in your prior real estate investment activities, you may be faced with a new challenge; how do you sell your property without paying income taxes, continue to receive monthly rental income and appreciation, yet not have to continue taking on the responsibility of property management? A Delaware Statutory Trust may be the solution you are looking for.







YOUR WAY OUT OF THE "TERRIBLE T'S"

The Terrible T's are what an active manager of real estate, or a landlord is responsible for, including toilets, tenants, trips to Home Depot, termites, and time spent. Many people like being real estate investors, but do not like being a landlord, have the time to spend on it, have the skill sets necessary to do it well, or have the energy.



"A DST can be a life-changing solution for owners of highly appreciated property. Now they can retire from being a landlord and STILL receive cash flow, tax savings, and diversify their portfolio with an asset that may appreciate in value."

-Lane Martinsen, President/Founder

REASONS FOR USING A DST 1031 EXCHANGE

Diversify your portfolio with stable Cash Flows

Avoid stock market, interest rate, and geographic risk by passively investing in DSTs.

Defer taxes when using a DST 1031 Exchange

Keep more of your money by deferring income taxes when it's time to sell investment properties.

Retain the abIlIty to receive a stepped-up basis.

Being an *accredited investor is the only requirement you need to own a piece of a DST.

DSTs can provide a back-up plan when using a 1031 Exchange

1031 Exchanges have strict timing guidelines to identify & close on investment properties. DSTs eliminate these obstacles since you buy shares quickly & easily.

Protect your spouse from unwanted landlord duties

Leaving a spouse with unwanted stress of being a landlord can be a frightening situation. With DSTs, your spouse will be left with passive investments that are paying monthly cash flows.

Protect heirs from estate tax and rushed liquidation

1031 Exchanges could eliminate all estate taxes which were once deferred, as well as remove the temptation of liquidating assets too quickly.

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